Trips Enterprise User Guide

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TMA SOFTWARE
Complete Community Transport Solutions

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Foreword

This is a basic guide on how to use and navigate Trips Enterprise, a complete community transport management system. TMA Central contains all of the client information, verified service events and controls the MDS submission. Adding a new client must be done in TMA Central.

Here is a list of some basic terms which will be referred to throughout this document:

Trip: A Trip is a single transport event for an individual.

Booking: A Booking is a future Trip.

Journey: A Journey is a transport event containing either one or multiple Trips. ie A bus Journey will contain a Trip for each individual it transports on the bus.

Verify: A Journey or Trip must be verified before it is transferred to TMA Central for MDS Submission.

MDS: Minimum Data Set this is the collated information that your state government requires to calculate your funding entitlements.

LGA: Local Government Area.

Basic navigation concepts:

Left Clicking on a record or button will highlight or select it. A selected record will be highlighted in blue. (Note this is by default if you have a different colour scheme selected in Windows this colour may be different.

Double Left Clicking on a record will open the record for editing.

Right Clicking on a record will display an options menu, listing the operations you can make to this record. You can select an option by Left Clicking on it. The basic options are “Insert” to create a new record. “Change” will open the record your cursor is on so you can view or modify it. “Delete” which will delete the record your cursor is on. Delete is not reversible. Other options may be listed allowing you to initiate actions specific to the screen you have open.

The History Tab in a record will display the creation and modification history of a record. This information is logged according to the user logged into Trips Enterprise.

Greyed out data fields, if a data field is greyed out it means you cannot change it. These fields may be changed in another screen.

Data columns can be resized by Left Clicking and holding on the edge of the column and dragging it either left or right.

Time field can be entered in 24 hour format, say the booking is for 1:30pm you can simply enter 1330 and press enter.

The Refresh button (or press F5) this allows you to refresh the data displayed on your screen.

If you have any questions about this guide do not hesitate to contact me.

Regards,

Andrew Sturt

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Shortcut Keys:

General

CTRL+A = Select All
CTRL+C = Copy
CTRL+X = Cut
CTRL+V = Paste
F5 = Refresh

Allocations Window

CTRL+Minus = Back One Day
CTRL+Plus = Forward One Day
CTRL+ALT+V = Verify All Today
CTRL+ALT+J = Pre-Verify All Journeys for Today

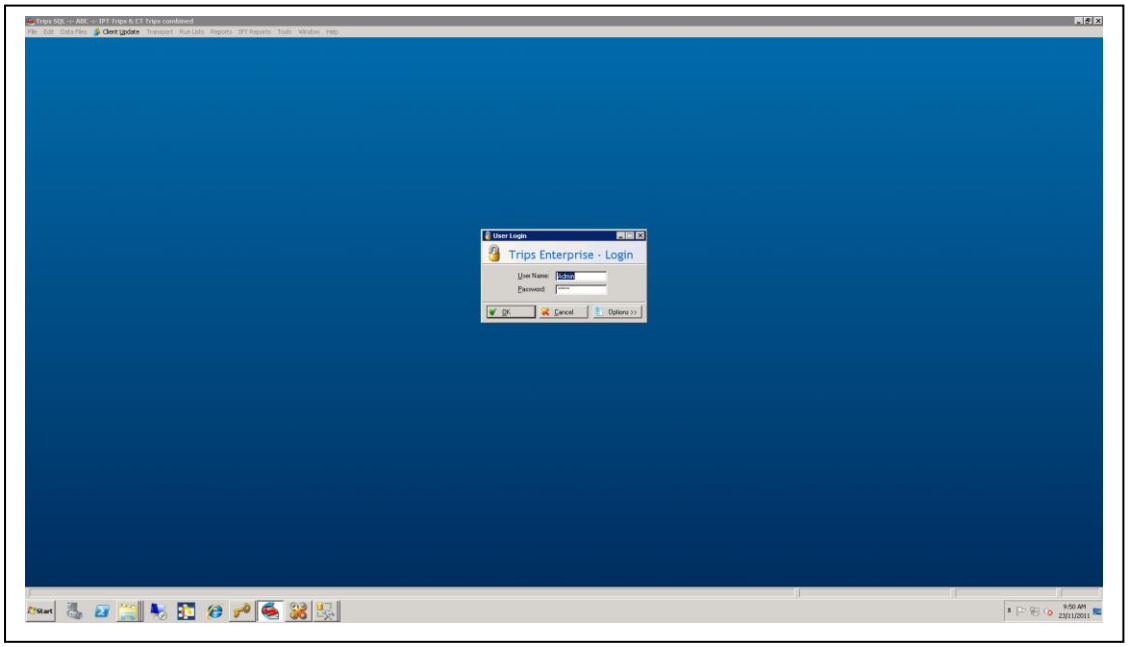
Bookings Window

CTRL+Minus = Back One Day
CTRL+Plus = Forward One Day
CTRL+ALT+A = Print All for Today
CTRL+ALT+S = Print Selected

Journey/Register Window

CTRL+ALT+V = Verify All Today

Welcome to Trips Enterprise



This is the first screen you will see when you open Trips Enterprise. It will prompt you to enter a username and password, the default username is admin and the default password is admin. Additional users can be setup in TMA Central in the Staff section.

If you left click on Options it will display some additional settings as below:

If you want to enable Auto Login please login first to ensure you have the right username and password, then close and reopen Trips then enable Auto Login.

License Information

After you login in the bottom right hand corner of the screen you will see your Trips Enterprise license information.

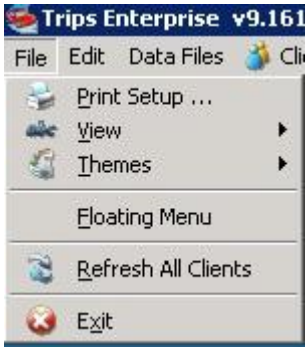
Below that you will also see the user name of the current user logged in and the level of access for this account.

It will also display the current date and time.

Main Menu Breakdown

Trips Enterprise v9.161.2 - TMA Test Database
File Edit Data Files Client Update Transport Run Lists Reports Tools Window Help

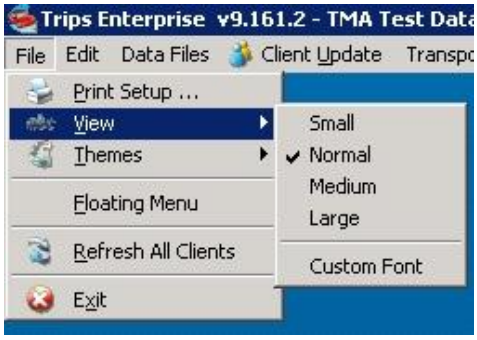
File



Print Setup – Allows you to select your default print and define the printer settings

View – Allows you to change the font size or font from four preset sizes or specify your own custom font.

NOTE: When specifying a custom font size only make small changes, it is possible to specify a font or font size that will make Trips unusable depending on your display settings.



Themes – No longer used

Floating Menu – Selecting this item allows you to build your own floating toolbar. This works by first selecting Floating Menu, then opening another menu and hold CTRL and left click on the menu item you would like to add to your floating menu.

For example if I would like to add Bookings to my floating menu I would Open the File menu then Left Click on Floating Menu, then I would open Transport and hold CTRL and Left Click on Bookings. This will add Bookings to the Floating Menu. This process can be followed with other menu items including Run Lists and Report Sections to build your own Floating Menu. The Floating Menu can also be positioned as you see fit by Left Click and holding on the Tearoff window title. To remove an item from the Floating Menu Right Click on it and select Delete.

Refresh All Clients – This will refresh all client information in Trips Enterprise by checking the client information against the TMA Central database. This is different to Client Update as it will give you the option to delete client information from Trips Enterprise that is no longer in TMA Central. CAUTION: Deleting a Client from Trips Enterprise will also remove their service history. If the funding type is blank it will reset it to HAC . If the Client Class is empty it will assign a class based on age under 60 YDA and over 60 FRA.

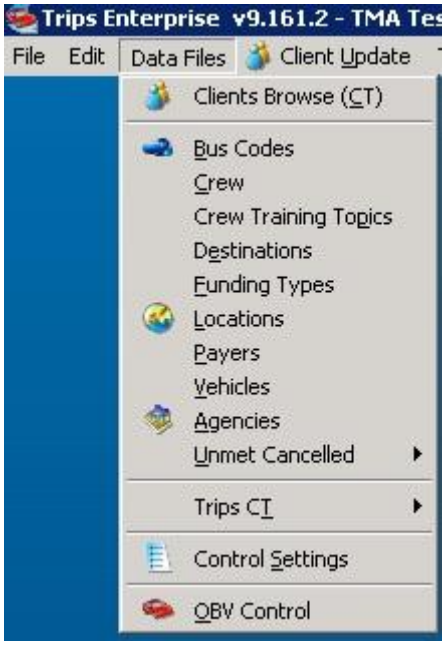
Exit – Closes Trips Enterprise.

Edit

Cut – Cuts the selected text to the clipboard (computer memory). Shortcut key CTRL-X
Copy – Copies the selected text to the clipboard (computer memory). Shortcut key CTRL-C
Paste – Pastes the text from the computer memory into the selected field. Shortcut key CTRL-V

Example: I want to copy a comment field from one Trip to another, I can highlight the selected text either by holding Left Click on the mouse and dragging over the selected text or pressing CTRL-A to select all then pressing CTRL-C to copy the text. Then open the target comment field, Left Click in the box and pressing CTRL-V to paste.

Data Files



Clients Browse – Opens the Browse the Clients File window. This is where you can view and modify Client details.

Bus Codes- Opens the Browse Bus Codes. This is where you can view, insert or modify Bus Codes.

Crew – Opens the Browse the Crew File window. This is where you can view, insert or modify your Crew records.

Crew Training Topics – Opens the Browse the CrewTraining Topics window. This is where you can view, insert or modify your Crew Training Topics.

Destinations – Opens the Browse Destination/Pickup-From Places window. This is where you can view, insert or modify Destinations.

Funding Types – Opens the Funding Types window. This is where you can view, insert or modify Funding Types.

Locations – Opens the Browse Suburbs/Towns window. This is where you can view, insert or delete suburbs/towns and specify LGAs. You can also edit the Locations list in TMA Central.

Payers – Opens the Browse Records window. This is where you can view, insert or modify Payer records.

Vehicles – Opens the Browse Vehicles window. This is where you can view, insert or modify Vehicle records.

Agencies – Opens the Browse Agencies File window. This is where you can view, insert or modify Agency records. This is used for e-mail contacts for referrals and send jobs.

Unmet Cancelled-> Cancelled Codes – Opens the Cancelled Transport Codes window. This is where you can view, insert or modify Cancelled codes. Do not change the codes that have a tick in the DADHC Cancellation column if you are required to send the NSW MDS.

Unmet Cancelled-> Unmet Codes – Opens the Unmet Transport Codes window. This is where you can view, insert or modify Unmet codes.

Trips CT-> Carriers – Opens the Browse the Carriers File window. This is where you can view, insert or modify Carriers codes.

Trips CT-> Client Classification – Opens the Browse Client Classification records window. This is where you can view, insert or modify Client Classification codes.

Trips CT-> Cost Zones – Opens the Browse the Cost Zone File window. This is where you can view, insert or modify Cost Zone Fares.

Trips CT-> Crew Type – Opens the Crew Types window. This is where you can view, insert or modify Crew Types.

Trips CT-> Mode – Opens the Browse MODE Records window. This is where you can view Modes.

Trips CT-> Profile – Opens the Browse Profile Records window. This is where you can view, insert or modify Client Profile records.

Trips CT-> Support Level – Opens the Browse Dependency window. This is where you can view, insert or modify Support Level records.

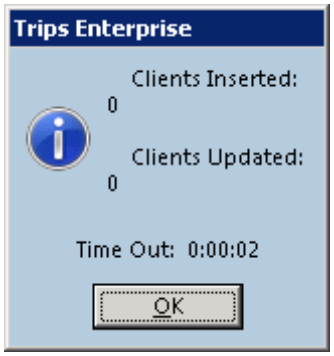
Trips CT-> Zone Descriptions – Opens the Browse the Zone File window. This is where you can view, insert or modify Zone records.

Control Settings – Opens the Change Control Settings window. This allows you to change the project detail, various other program defaults and trips settings.

OBV Control – Opens the OBV Control window. This allows you to change OBV vehicle assignments, settings, display vehicle location and send messages to OBV units. NOTE: Only visible if *Enable OBV Functionality* has been ticked in *Connectivity* in *Control Settings*. This setting only applies to organisations that have purchased OBV Units. If you would like to trial a OBV Unit please contact us for further information.

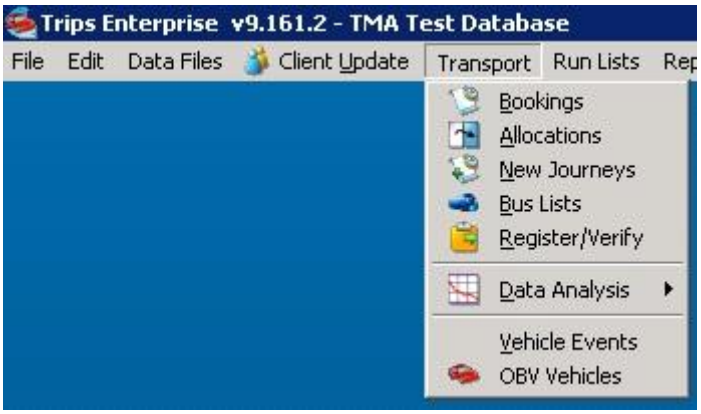
Client Update

Left Clicking on Client Update will check for any new clients or client changes in TMA Central and import them into Trips Enterprise.



Transport

The Transport Menu allows access to the major work centers in Trips.



Bookings – Opens the Bookings window. This is where you can view, insert or modify Bookings.

Allocations – Opens the Allocations window. This is where you can allocate Bookings to Journeys or reassign Bookings.

New Journeys – Opens the New Journeys window. This is where you can view, insert or modify Journeys and Trips.

Bus Lists – Opens the Bus List window. This is where you can view, insert or modify Bus Lists.

Register/Verify– Opens the Verify Journeys/Journey Register window. This is where you can view, modify or verify Journeys and Trips. Only Verified Journeys and Trips are reported in your MDS.

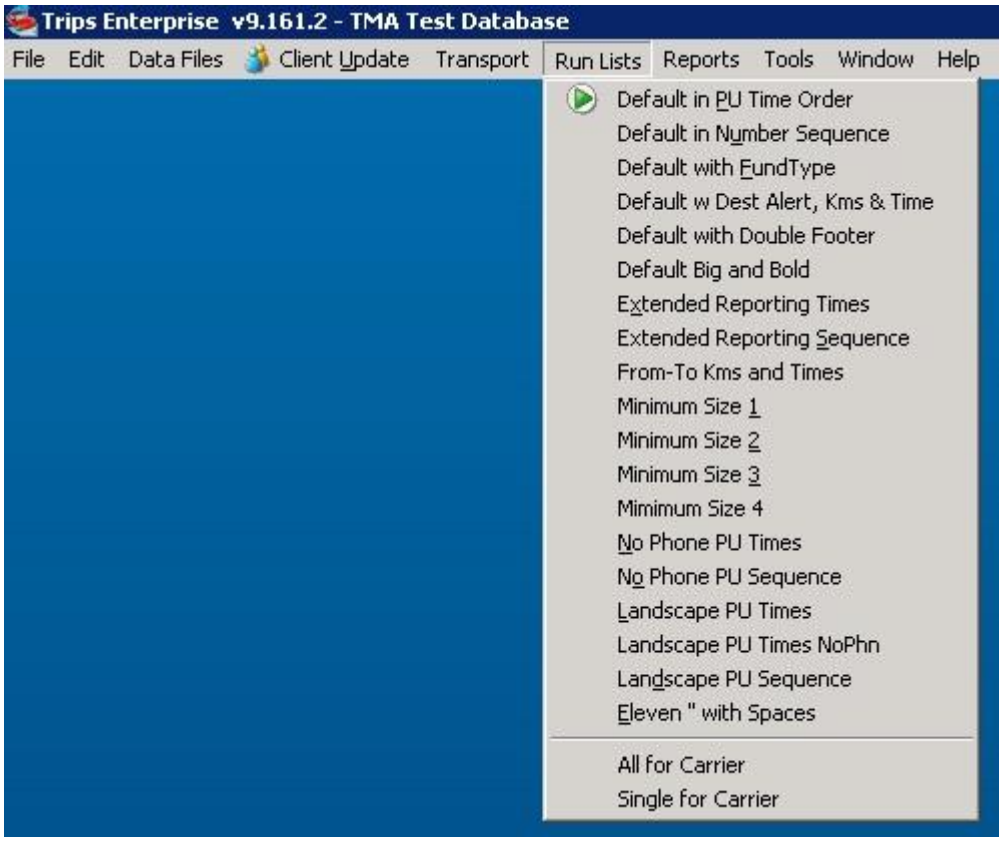
Data Analysis -> Trips Query – Opens the Trips Query window. This is where you can create queries to display certain Trips. You can also modify Trips from this window and export the data to other file formats.

Data Analysis -> Passenger Ratio – Opens the Passenger Ratio window. This will display your Trips to Journey ratio over a given time frame.

Vehicle Events – Opens the Browse the Vehicle Event File window. This is where you can view, insert or modify Vehicle Events.

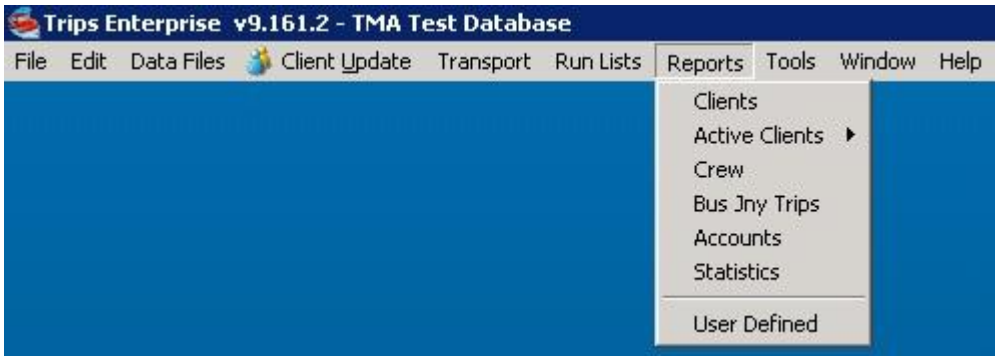
OBV Vehicle – This has been moved to OBV Control.

Run Lists



This menu lists all of the different Run Lists you can print from Trips. If you have highlighted a Journey record in New Journeys, left clicking on a Run List will display a print preview on your screen before you print it off.

Reports



Clients – Opens the Select Report window listing Client centric reports. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

Active Clients ->

1. Make Active Clients File – Opens the Client Using Service in Period Extract window. Fill in the form to generate the Active Clients File.

2. Active Clients Report – Active Clients Report will generate a Print Preview of the report which can then be printed.

OR

2. Active Clients Spreadsheet – Active Clients Spreadsheet will generate a file called ActiveCients.csv in your My Documents folder. This file can be opened by Excel.

Crew – Opens the Select Report window listing Crew centric reports. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

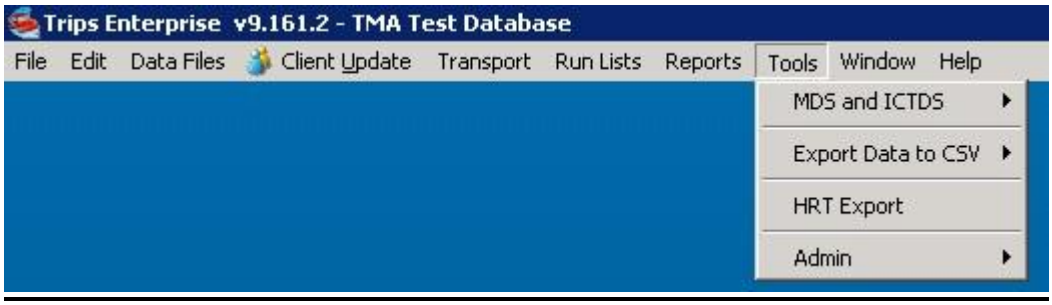
Bus Jny Trips – Opens the Select Report window listing Bus, Journey and Trip centric reports. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

Accounts – Opens the Select Report window listing Accounts centric reports. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

Statistics – Opens the Select Report window listing Statistics centric reports. All Statistic reports include only verified trips records. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

User Defined – Opens the Select Report window listing User Defined reports. If you do not have any User Defined reports it will display an error message.

Tools



MDS and ICTDS –> MDS and ICTDS Reports - Opens the Select Report window listing MDS and ICTDS centric reports. Left Click on the desired report and Left Click Select. Follow the prompts to generate the report.

Transfer Service Events to TMA Central - Opens the Set Funding Export Dates window which allows you to select which quarter of information to send to TMA Central. This step must be completed before submitting your MDS/ICTDS in TMA Central.

Export Data to CSV -> Simple Export -> (Database Table) ie Clients- This will export all of the information in the selected table to a csv (open with Excel) file in your My Documents folder. Eg Selecting the Cients simple export will export all of the client information to your my documents folder in a file called Clients.csv.

Export Data to CSV -> Designer Export- This will open the Trips Data Export Window. This window allows you to select which specific information you would like to export from the Trips Enterprise Database. (For advanced users)

HRT Export- Only used for Health Related Transport statistics for Greater Southern Area Health Service in NSW.

Admin -> Client Name Update -> Bookings or Buses or Trips- These, in turn, will refresh all Bookings, Bus Lists and Trips records. Only future Trips records (from the day of running this process) are refreshed. For example if a Client's address changes you can run the Client Name Update to automatically update their address in future Bookings and Trips and in the Bus Lists.

Admin -> Processes -> Change Dependency Value- If you use the support rating tool you may wish to change the names given to the various levels of support. You can do so using this tool.

Admin -> Related Locations- Unused at this time.

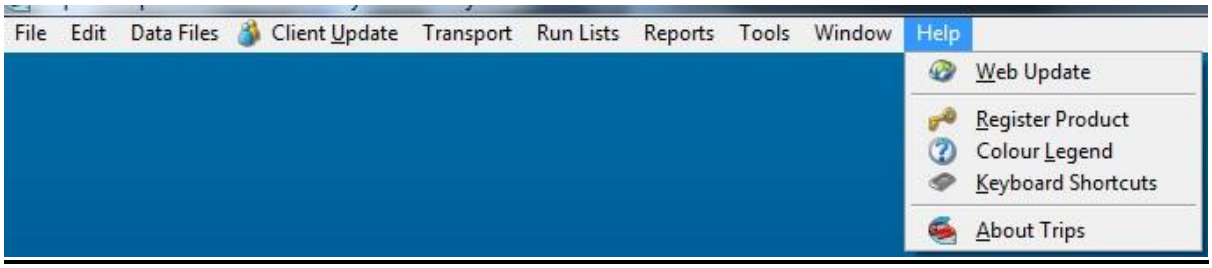
Window

Enable Alternate window manager – This menu item should always be ticked. If you have a build-up of the close, minimise and maximise windows buttons, check to make sure this item is ticked.

Tile, Cascade and Arrange Icons – Not used.

This menu will also list all other windows you have open. You can change to an open window by Left Clicking on it in this menu.

Help



Web Update – This will update your program via the internet. DO NOT run this unless instructed by TMA or your IT support.

Register Product – This is where you can enter your license registration code. If you need a registration code please contact TMA.

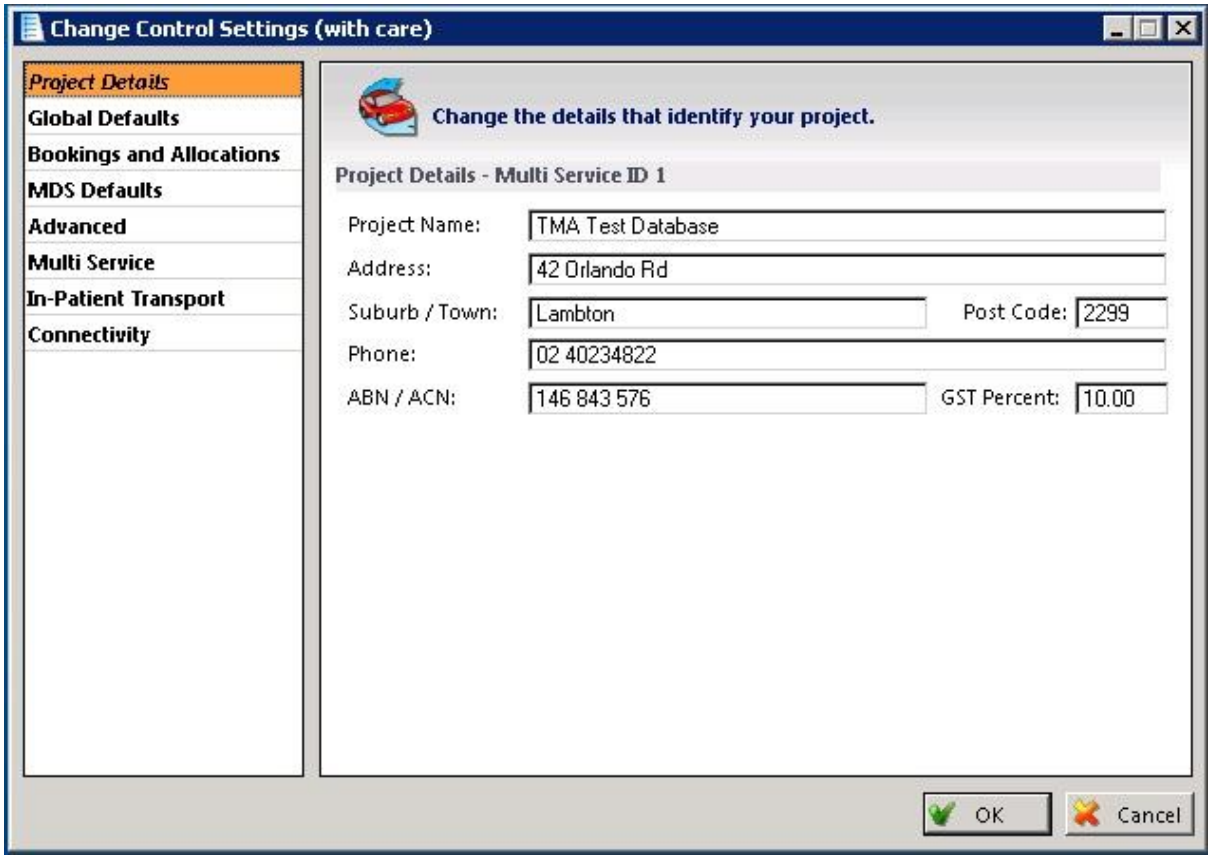
Colour Legend – This will display a legend of all the different colour codes used in trips Enterprise.

Keyboard Shortcuts – This will display the keyboard shortcuts used in Trips Enterprise.

About Trips – This will display the database connections and general information about Trips Enterprise and the contact information for TMA Software.

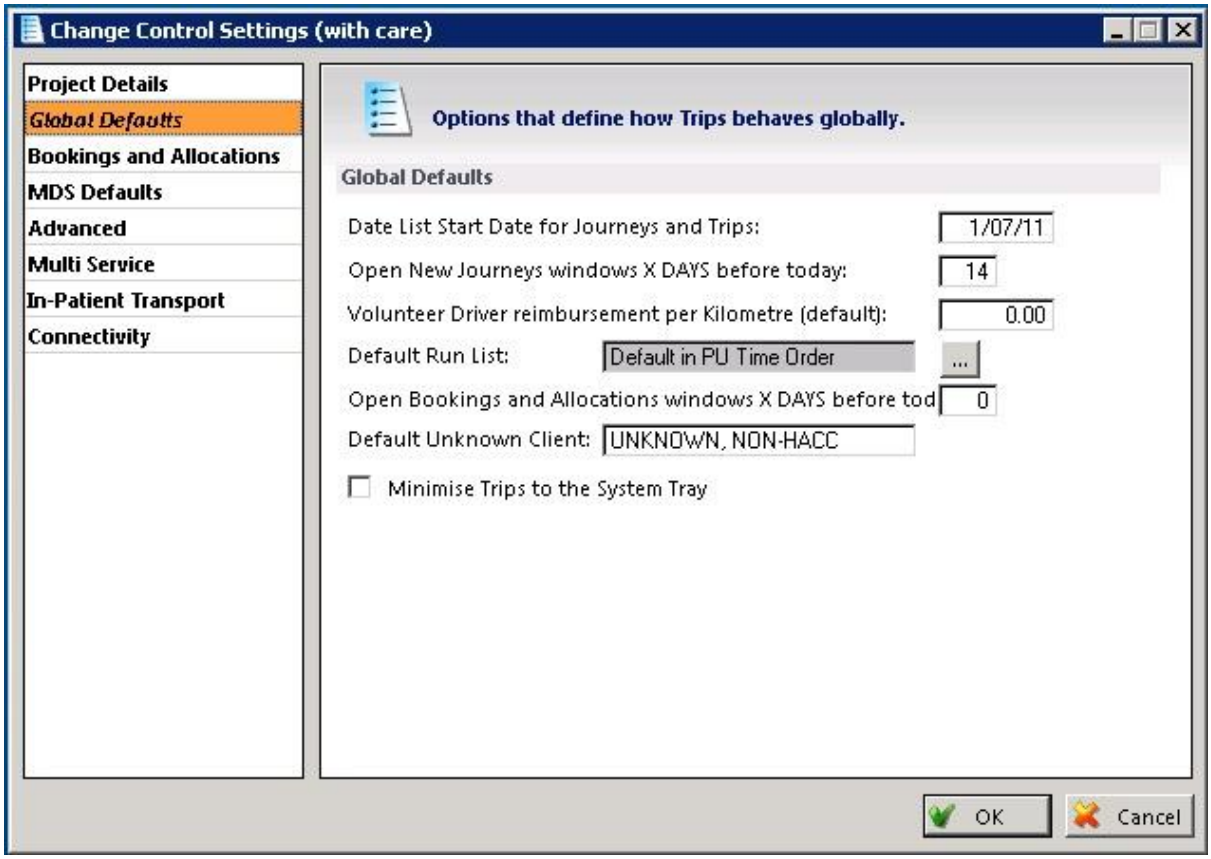
Control Settings

Changing these settings will affect all Trips Enterprise users. Handle with care.



Project Details

Enter your project and organisation information into the appropriate fields.



Global Defaults

Date List Start for Journeys and Trips: (set when Trips is first installed)
This sets the start date for the date list in the journeys and trips screens.

Open New Journeys windows X DAYS before today:
Sets the default starting date for the New Journeys window when it is first opened.

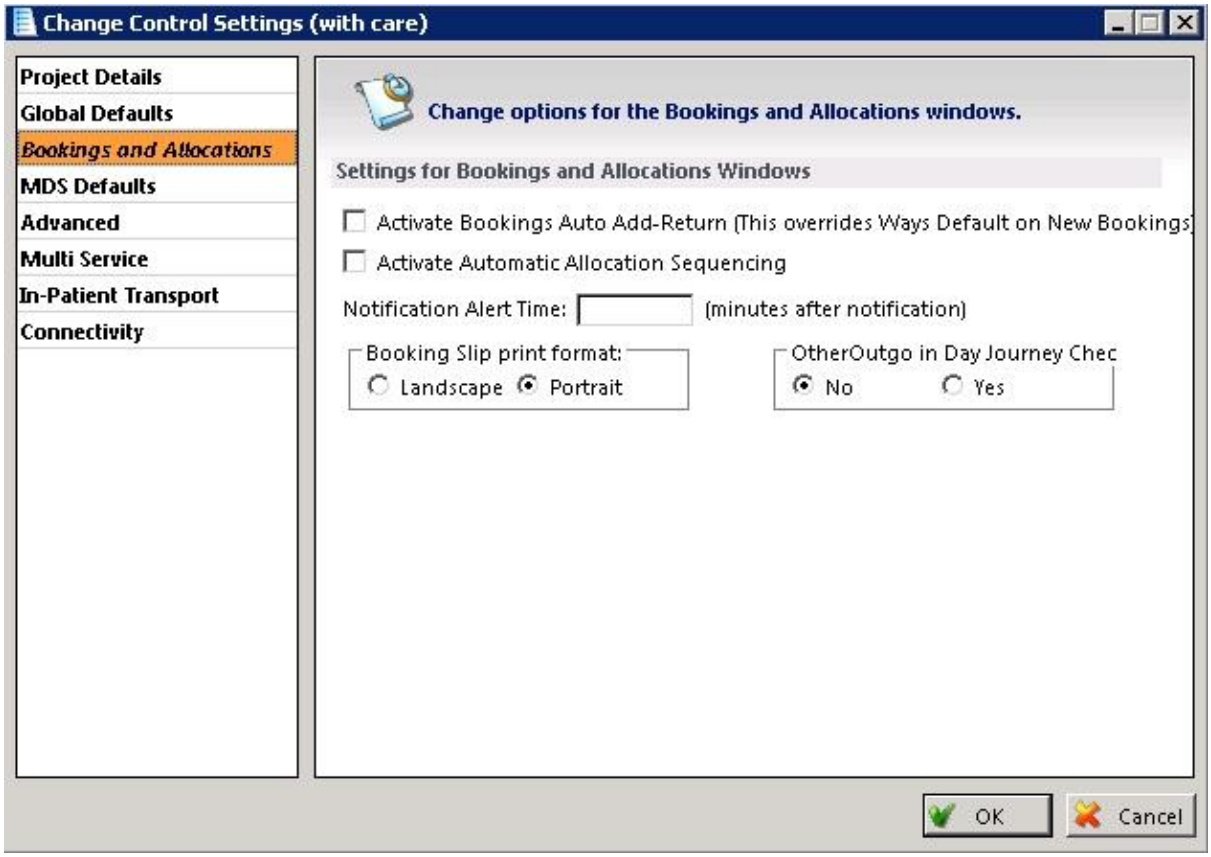
Volunteer Driver reimbursement per Kilometre (default):
This sets the default per km reimbursement rate for volunteer drivers.

Default Run List:
This sets the default run list, it will also display a green symbol next to the default run list in the Run Lists menu.

Open Bookings and Allocations windows X DAYS before today:
Sets how many days before today's date the bookings and allocation screen will default to.

Default Unknown Client:
This sets the default unknown client to be used when an unknown client is inserted.

Minimise Trips to the System Tray
Ticking this check box will change Trips from minimising to the taskbar to the system tray near the clock in the bottom right hand corner of your screen.



Bookings and Allocations

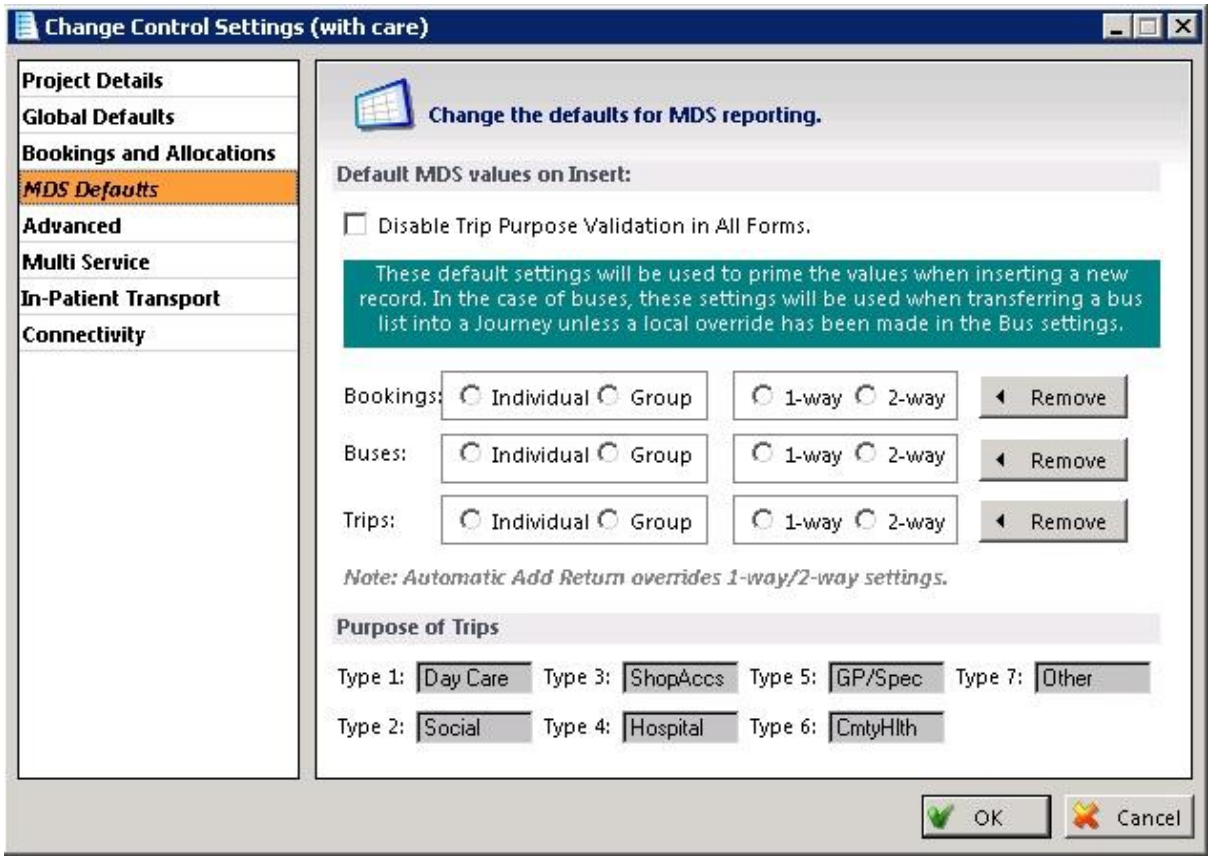
Activate Bookings Auto Add Return (This overrides Ways Default on New Bookings)
Enabling this setting will automatically add a return booking for each new booking.

Activate Automatic Allocation Sequencing
Automatically assigns an allocation number to a booking. Not currently utilized.

Notification Alert Time (minutes after notification)
Not Used

Booking Slip print format
Sets the print format of Booking Slips.

OtherOutgo in Day Journey Check
Not used

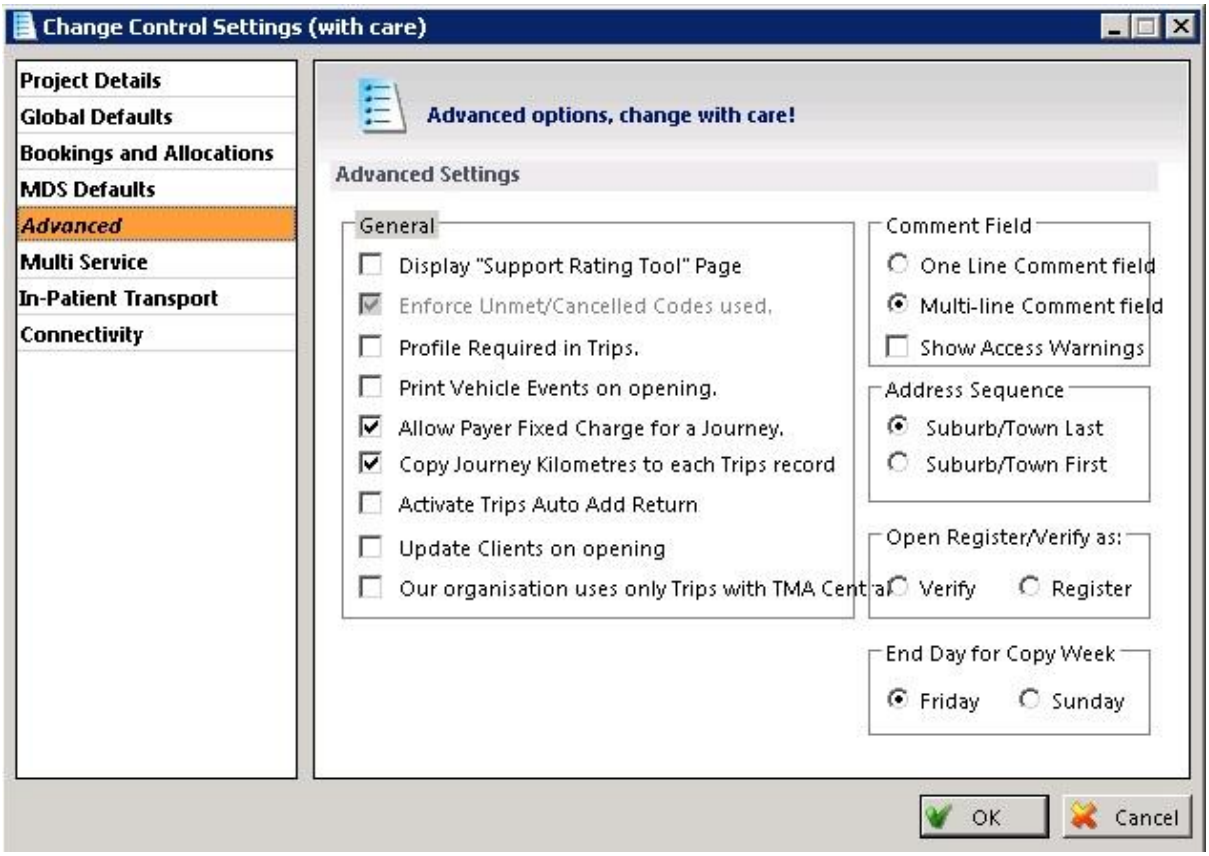

Change Control Settings (with care)
Project Details
Global Defaults
Bookings and Allocations
MDS Defaults
Advanced
Multi Service
In-Patient Transport
Connectivity
Change the defaults for MDS reporting.
Default MDS values on Insert:
Disable Trip Purpose Validation in All Forms.
These default settings will be used to prime the values when inserting a new record. In the case of buses, these settings will be used when transferring a bus list into a Journey unless a local override has been made in the Bus settings.
Bookings: Individual Group 1-way 2-way Remove
Buses: Individual Group 1-way 2-way Remove
Trips: Individual Group 1-way 2-way Remove
Note: Automatic Add Return overrides 1-way/2-way settings.
Purpose of Trips
Type 1: Day Care
Type 2: Social
Type 3: ShopAccs
Type 4: Hospital
Type 5: GP/Spec
Type 6: CmtyHlth
Type 7: Other
OK
Cancel

MDS Defaults

Disable Trip Purpose Validation in All Forms
Removes the MDS validation checks for ALL data entry forms. This should only be ticked by organisations who do not submit MDS reports

Bookings, Buses and Trips
Sets defaults for new bookings, buses and trips. ie Select Individual and 1-way for Bookings and when you create a new Booking those fields will already be set. If you do not want any defults click the Remove button to clear your selections

Purpose of Trips
MDS types, informational only, these cannot be changed.



Advanced

Display "Support Rating Tool" Page
Ticking this setting will enable the Support Rating and Rating Tool Tab in all bookings, trips and client forms.

Enforce Unmet/Cancelled Codes Used
Cancelled codes are compulsory for the NSW MDS. If you are using national MDS you can turn this setting on or off.

Profile Required in Trips.
Ticking this setting will make the Profile field a required field in Trips.

Print Vehicle Events on opening.
Ticking this setting will display a print preview of the vehicle events for that day when Trips Enterprise is opened.

Allow Payer Fixed Charge for a Journey.
Ticking this setting will allows you to assign a fixed charge for a journey to a payer.

Copy Journey Kilometres to each Trips record
Ticking this setting will automatically copy the journey kilometres to each trip assigned to that journey. **This can lead to considerable inaccuracy in client kilometres used with care.**

Activate Trips Auto Add Return
Ticking this setting will enable automatically adding a return trip for each new entry.
Update Clients on opening
Ticking this setting will make Trips Enterprise update the clients database from TMA Central every time it is opened. It is recommended that this setting is enabled.

Our organisation only uses Trips with TMA Central
This setting should be unticked if you are using Caremaster or MnM as well as Trips Enterprise.

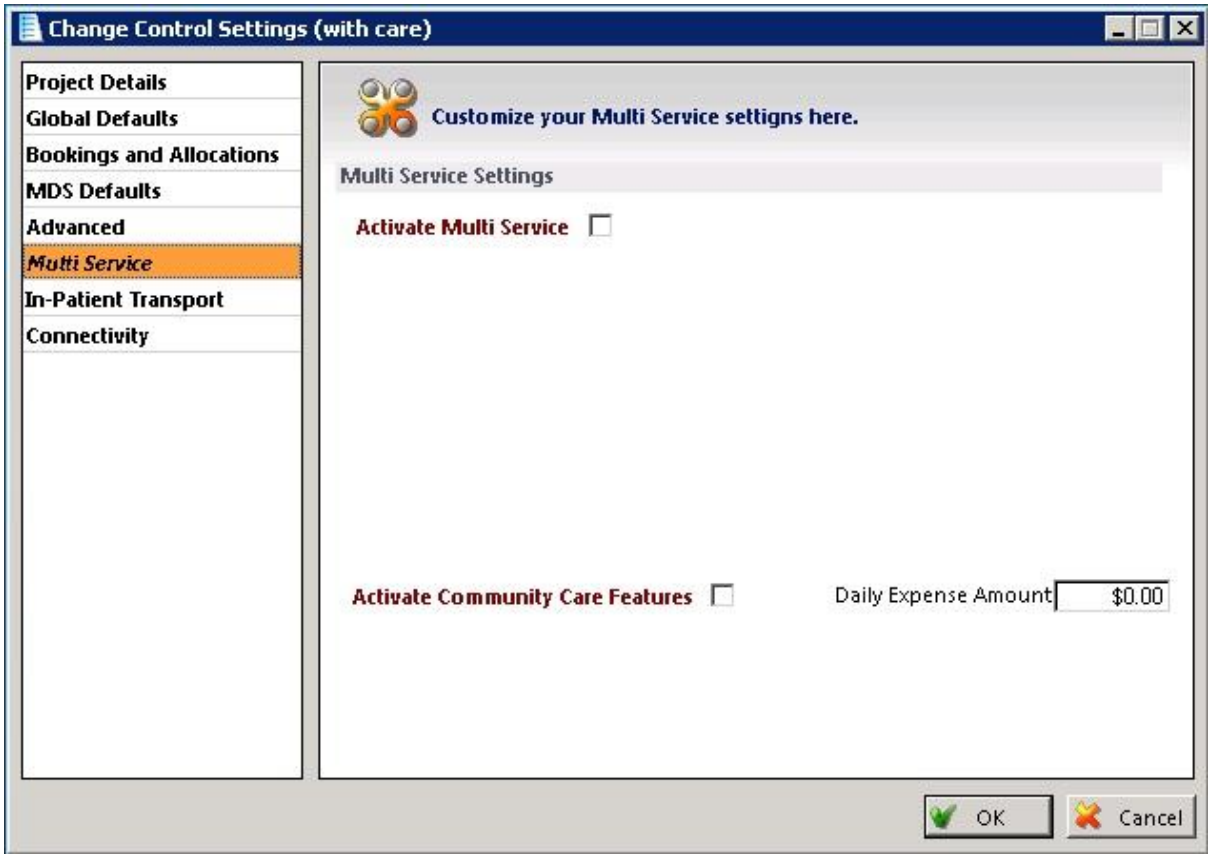
Comment Field
Selecting the one line comment field restricts you to a 35 character comment on the front of the entry forms and on run lists. Selecting the multi-line comment field expands this to 255 characters and moves the comment field to a comment tab.

Show Access Warnings
No longer used. Access Warnings for poor access destinations is now standard.

Address Sequence
Changes the way addresses are displayed; suburb/town first or normal.

Open Register/Verify As
Changes the default view for the Register/Verify Screen. “Register” displays all Trips, “Verify” only displays Trips with Future status to help when doing verification.

End Day for Copy Week
Changes the day Trips ends a “week” on. Choices are Friday or Saturday.
Used for copying weeks forward.

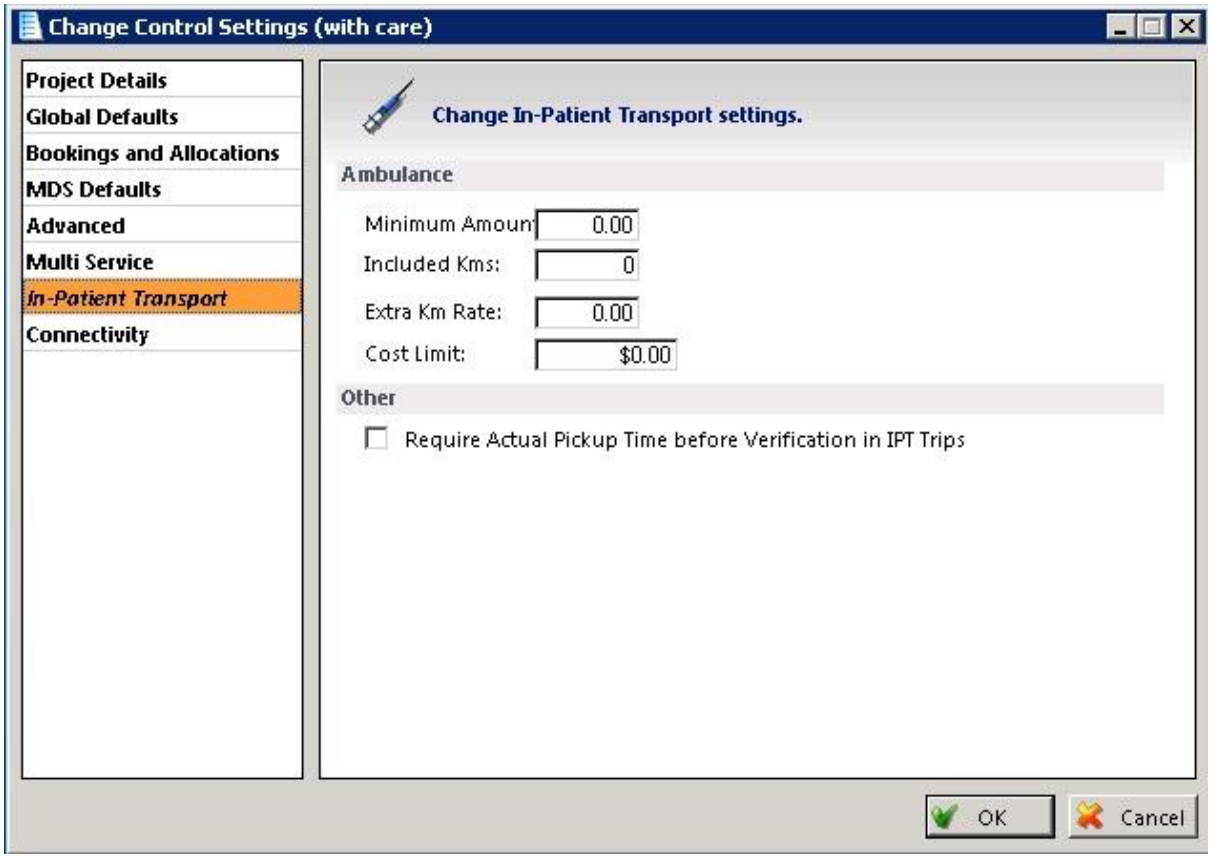


Multi Service

Activate Multi Service
Ticking this setting enables the multi service features of Trips Enterprise. Allowing up to six different HACC MDS service types to be recorded in a trip record.

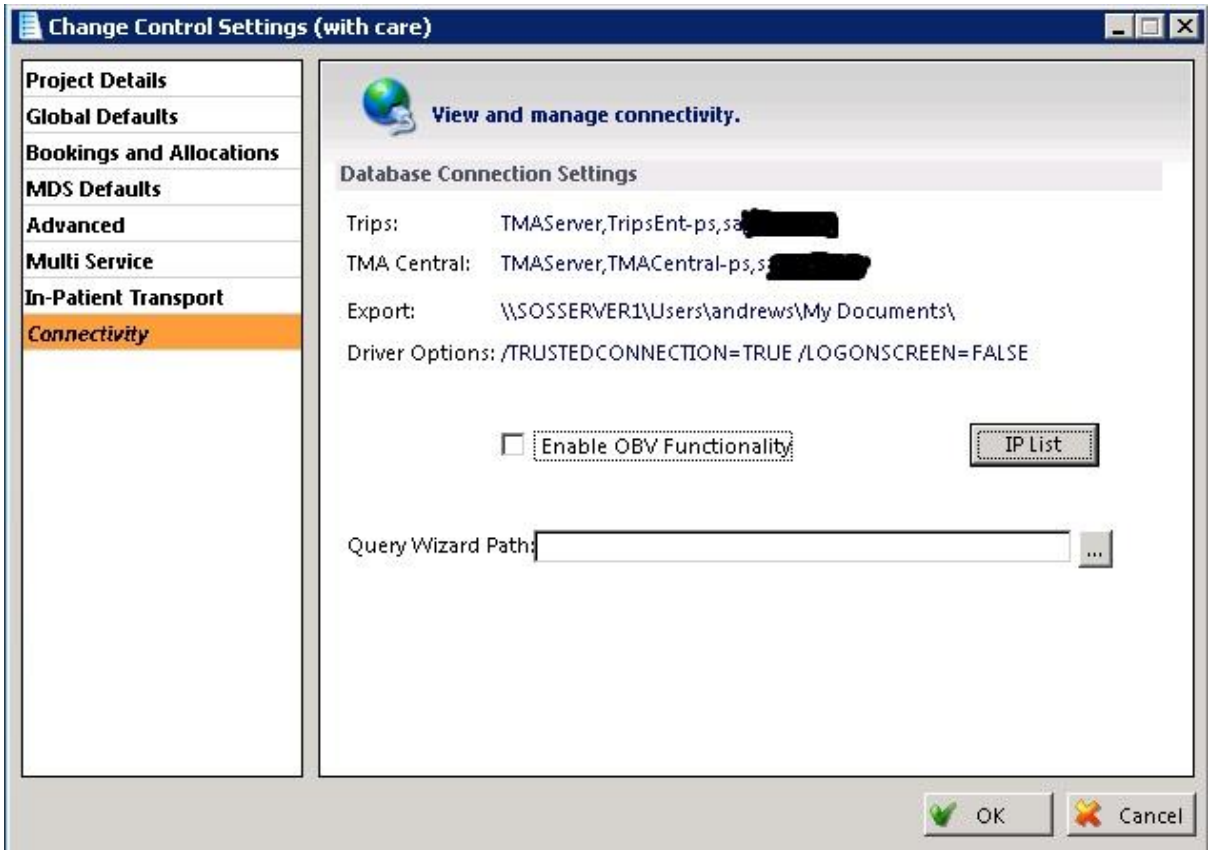
Activate Community Care Features
No longer used.

Daily Expense Amount
No longer used.



In-Patient Transport

These settings are only used for Health Transport.



Connectivity

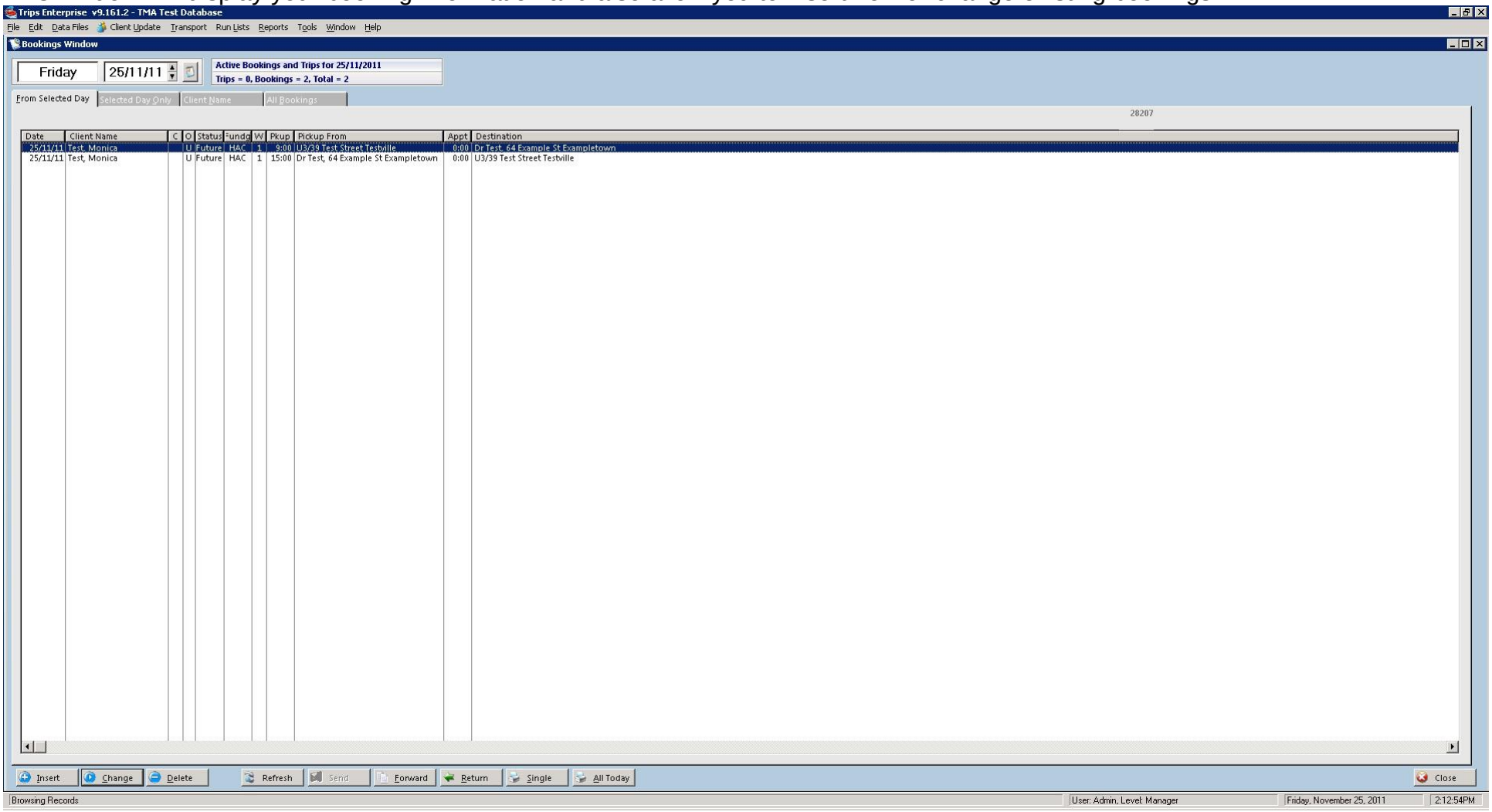
Enable OBV Functionality
Ticking this setting enables the OBV features of Trips Enterprise.

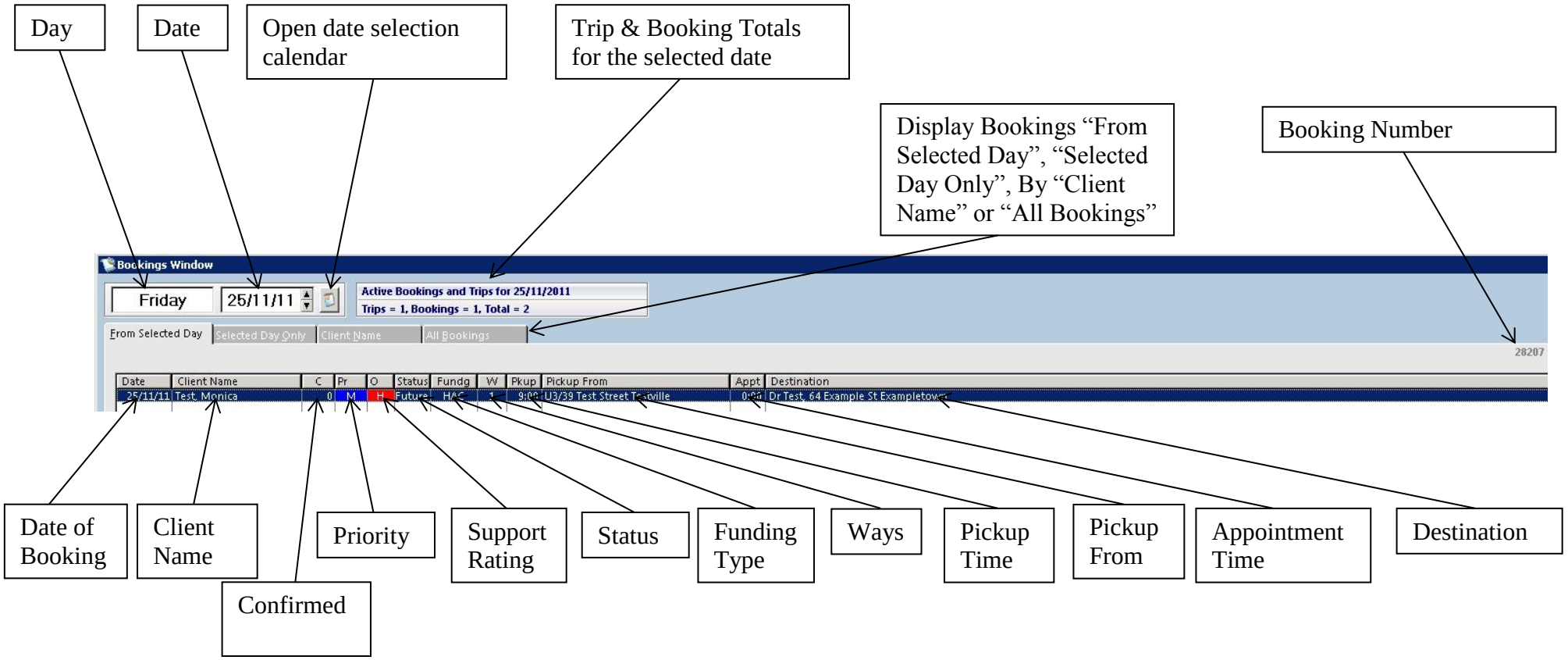
IP List
Clicking this button will display the IP addresses of the current computer.

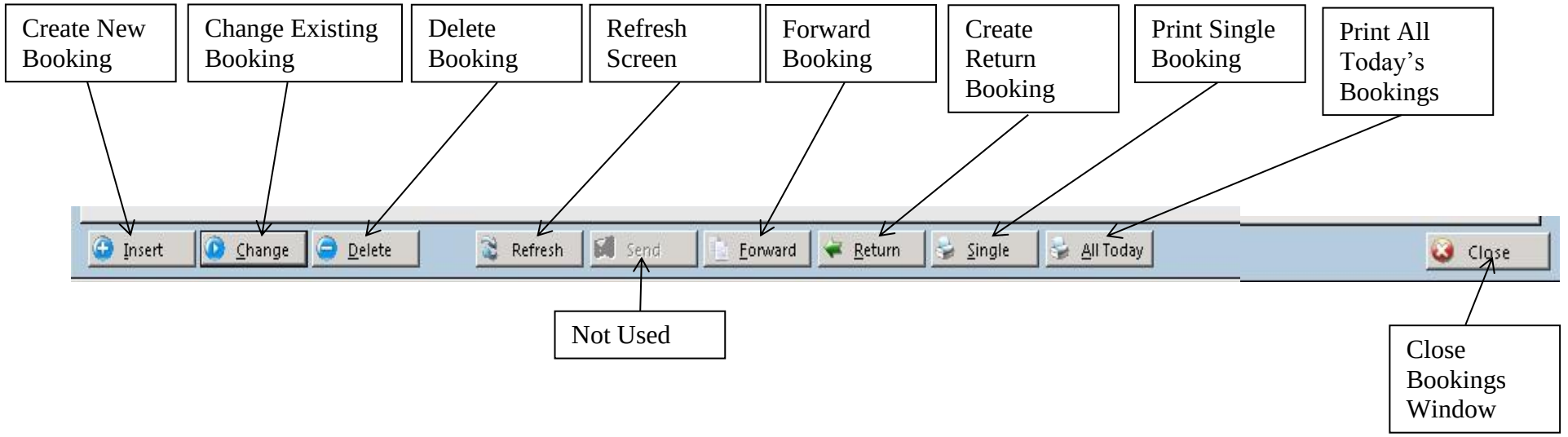
Query Wizard Path
This is the file path where saved queries are stored. The default folder is the Trips Enterprise program folder.

Bookings (Transport->Bookings)

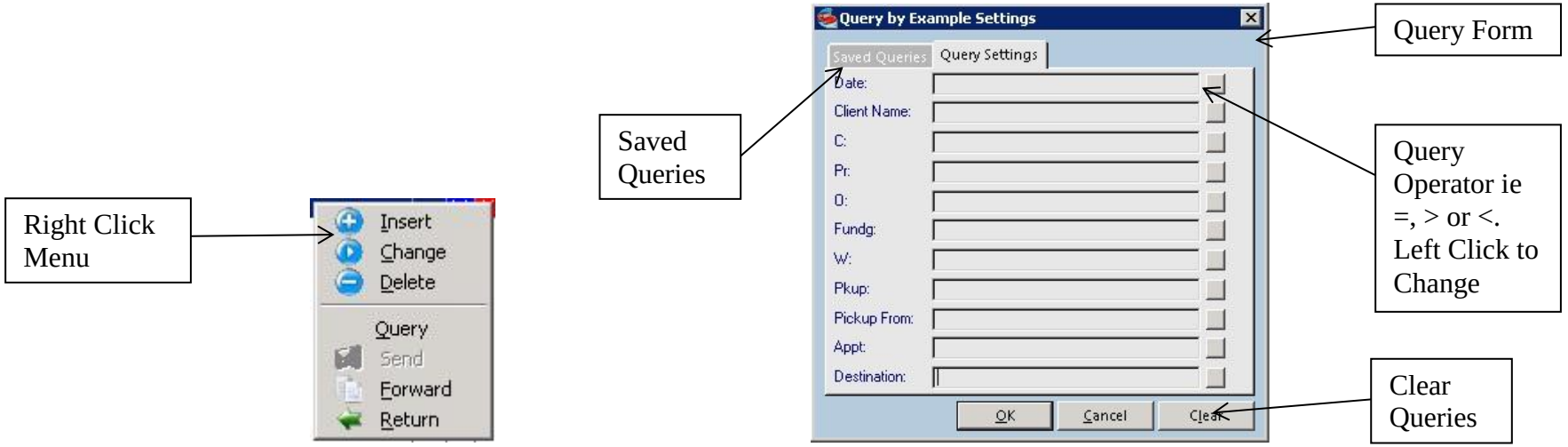
This window will display your booking information and also allow you to insert new or change existing bookings.


Trips Enterprise v9.161.2 - TMA Test Database
File Edit Data Files Client Update Transport Run Lists Reports Tools Window Help
Bookings Window
Friday
25/11/11
Active Bookings and Trips for 25/11/2011
Trips = 0, Bookings = 2, Total = 2
From Selected Day
Selected Day Only
Client Name
All Bookings
28207
Date Client Name C O Status Fundg W Pkup Pickup From Appt Destination
25/11/11 Test, Monica U Future HAC 1 9:00 U3/39 Test Street Testville 0:00 Dr Test, 64 Example St Exampletown
25/11/11 Test, Monica U Future HAC 1 15:00 Dr Test, 64 Example St Exampletown 0:00 U3/39 Test Street Testville
Insert
Change
Delete
Refresh
Send
Forward
Return
Single
All Today
Close
Browsing Records
User: Admin, Level: Manager
Friday, November 25, 2011
2:12:54PM

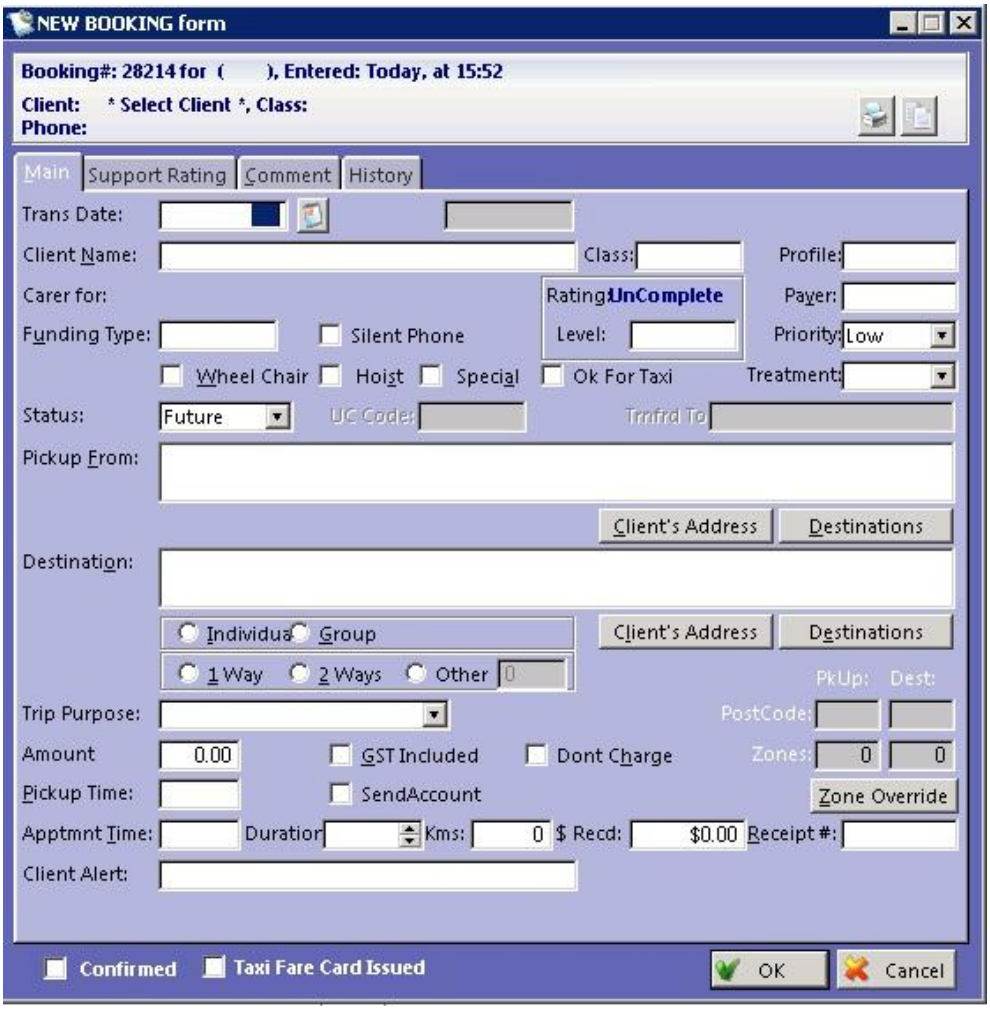

Day
Date
Open date selection calendar
Trip & Booking Totals for the selected date
Display Bookings "From Selected Day", "Selected Day Only", By "Client Name" or "All Bookings"
Booking Number
Bookings Window
Friday
25/11/11
Active Bookings and Trips for 25/11/2011
Trips = 1, Bookings = 1, Total = 2
From Selected Day
Selected Day Only
Client Name
All Bookings
28207
Date
Client Name
C
Pr
O
Status
Fundg
W
Pkup
Pickup From
Appt
Destination
25/11/11
Test, Monica
Future
HAC
Dr Test, 64 Example St Exampletown
Date of Booking
Client Name
Confirmed
Priority
Support Rating
Status
Funding Type
Ways
Pickup Time
Pickup From
Appointment Time
Destination



These functions can also be accessed by Right Clicking on a Booking. This will also display a Query option allowing you to specify the criteria for the bookings displayed.



NEW Booking Form



Trans Date: (can enter via calendar button)
Date of Transport Booking

Client Name:
Enter the client's name for transport. Partially typing a client's name (last name first) then pressing either TAB or Enter will display a list of client's.

Class:
This is the Client Classification. (See page 67)

Carer For:
If booking a carer this will display which client is cared for.

Funding Type:
This is the Funding Type for this client's Trip.

Profile:
This is the Profile classification. (See page 71)

Payer:
This is the payer responsible for paying for the Trip. (See page 62)

Priority:
Priority of the Booking, low will not display a colour in the booking screen, medium will be blue and high will be red. This will show in the Pr (Priority Column)

Treatment:
Only used for Health Transport.

Rating: & Level:
This is the Rating and Level calculated from the answers given in the Support Rating Tab.

Silent Phone Checkbox:
Informational only.

Wheelchair Checkbox:
This should be ticked if a client requires a wheelchair. If this is selected the client's name will be highlighted green in the bookings and subsequent trips screens.

Hoist Checkbox:
This should be ticked if a client requires a hoist.

Special Checkbox:
This should be ticked if a client has special requirements. If this is selected the client's name will be highlighted yellow in the bookings and subsequent trips screens.
If wheelchair and special are ticked the client will be highlighted in red.

Status:
The status drop down box can be Future, Cancld, Trnfrd, Unmet or Posted.

UC Code:
This is entered when the booking status is changed to Cancld or Unmet. (See page 75)

Trnfrd To:
This is entered when the booking status is changed to Trnfrd.

Pickup From: & Destination:
Pickup location for the booking. The Client's Address button will automatically enter the client's address and the Destinations button will bring up the list of destinations. (See page 59)

Individual or Group Radio Box
This indicates whether the booking is an individual or group booking.

1 Way, 2 Ways or Other Radio Box
This indicates how many trips should be reported to the MDS for this booking.

Trip Purpose:
This drop down box will let you select from Day Care or other HACC services, Social/Recreational, Shopping or Access, Hospital (inpatient/outpatient), GP/Specialists, Community Health Centre, Other and Non HACC.

Amount:
This is the amount asked from the client for the booking.

GST Included Checkbox:
If this is ticked GST is included in the Amount asked field.

Don't Charge:
If this is ticked there will be no charge to the Client for the Trip.

Pickup Time:
This is the Pickup Time of the booking.

SendAccount Checkbox:
If this is ticked an account should be sent to the Payer.

Apptmnt Time:
The time of the client's appointment if applicable.

Duration:
The expected duration of their appointment.

Kms:
Expected Kms for the booking.

$ Recd:
Amount received for the booking. Entered after the event or by Trips OBV.

Receipt #:
Number of the receipt for this account. This number is manually entered and should match your receipt or invoice number from your accounting system.

Client Alert:
This is an additional text alert displayed in red. When it is entered in the client record it displays the booking and trip records.

Confirmed Check Box:
If this is ticked a green tick will be displayed in the C column in the bookings screen.

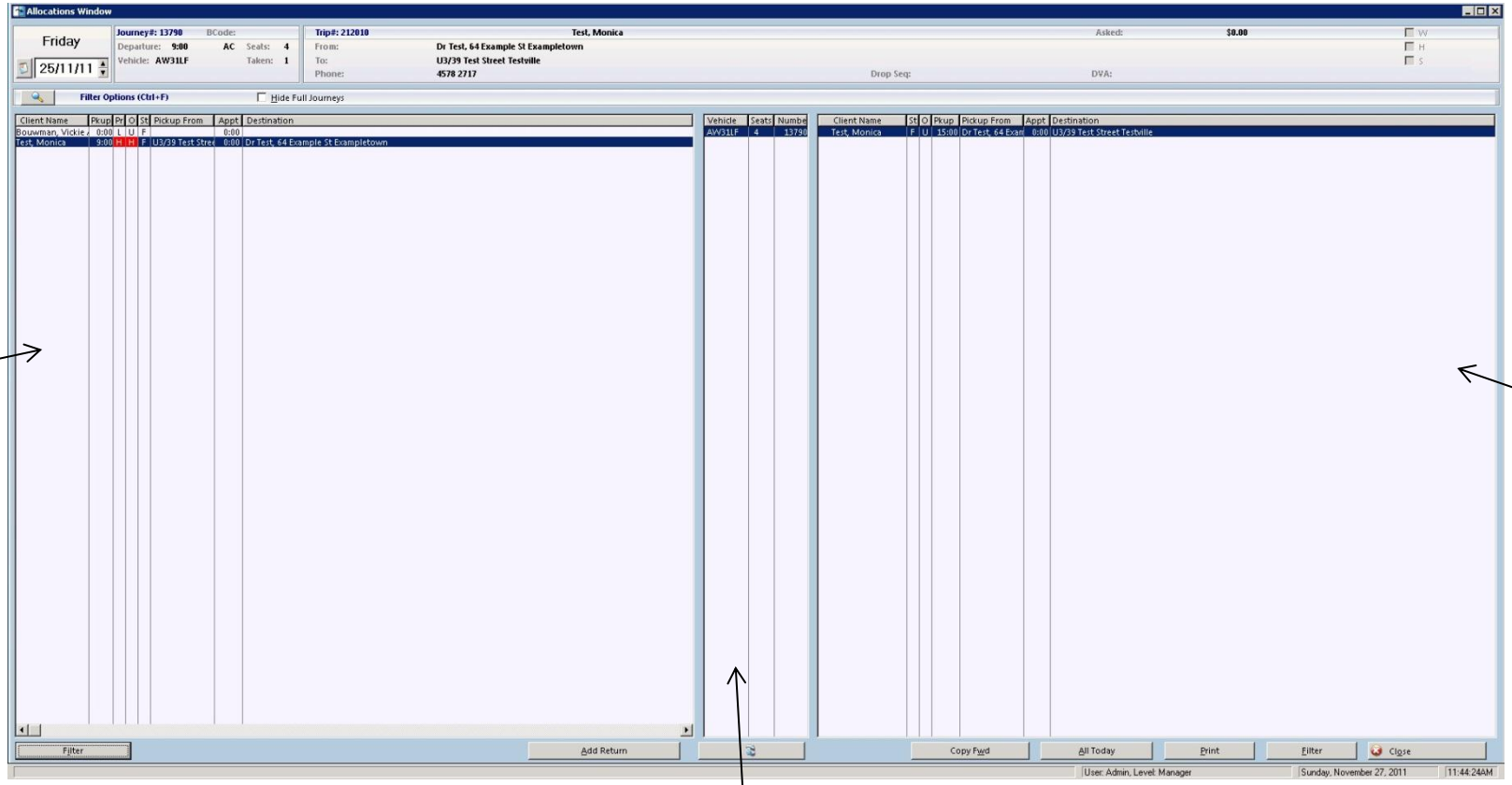
Taxi Fare Card Issued Check Box:
This check box enables you to record if a Taxi Fare Card has been issued for this booking.

Support Rating Tab
Shows the support rating of the client. The default support rating is set in the client record. This tab informs you of the transport requirements of the client. The support rating can be modified for a particular trip without affecting the default.

Comment
You can input a comment that may be displayed on the driver's run list or OBV unit. If a comment is entered into a client's record it will be transferred to the booking record on client lookup.

Allocations (Transport->Allocations)

This window will display your allocation information. It will allow you to assign bookings to journeys, move bookings or trips, and create or modify bookings, trips and journeys. To allocate a Booking (left box) first select a Journey in the Journeys section (middle column) then Left Click and drag the Booking to the Allocated section (right box).

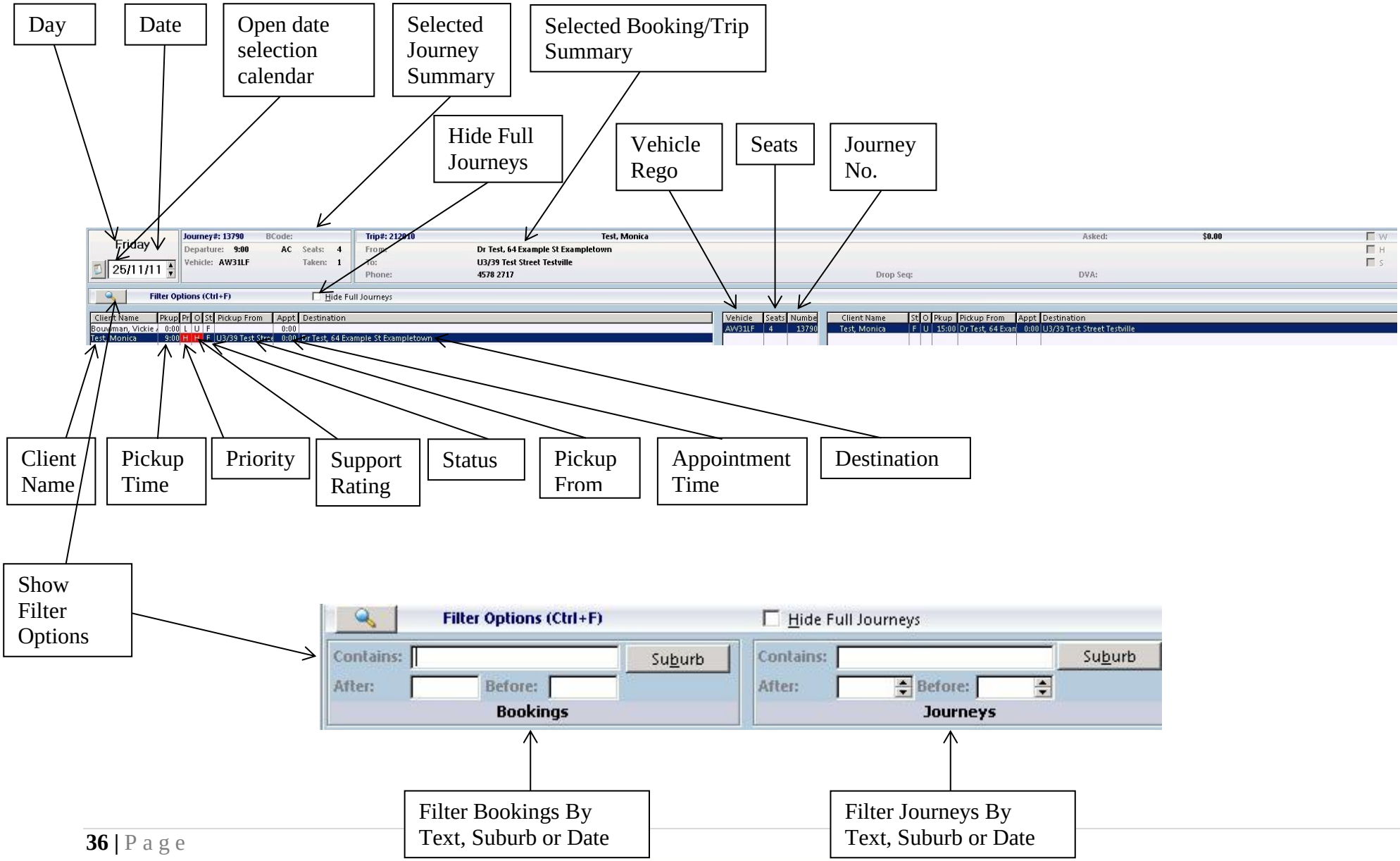


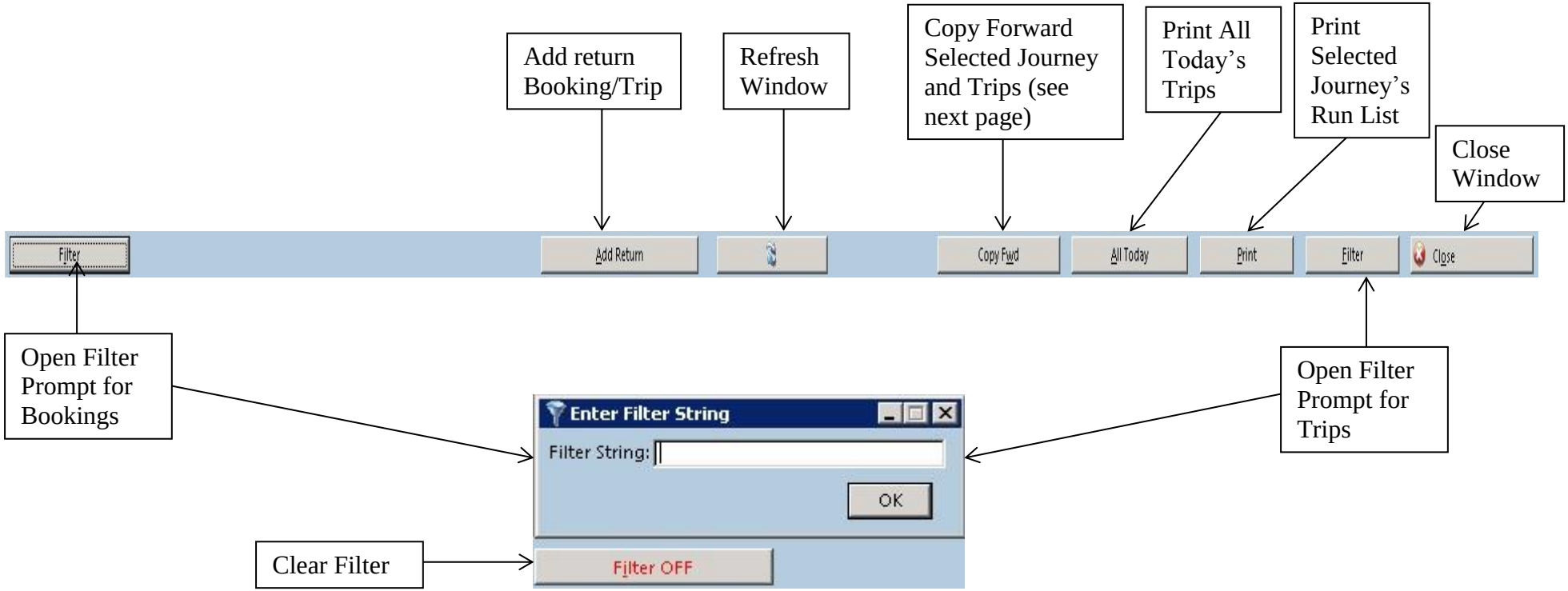
Unallocated Bookings Section

Allocated Bookings & Trips Section

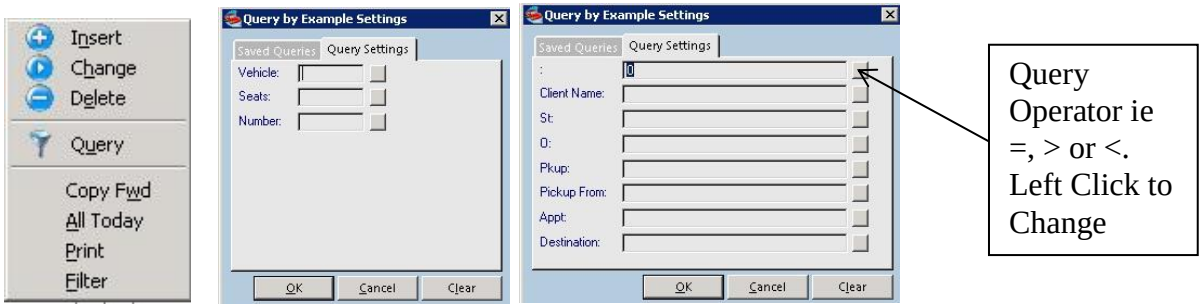
Journeys Section

TMA SOFTWARE
Complete Community Transport Solutions


Day
Date
Open date selection calendar
Selected Journey Summary
Selected Booking/Trip Summary
Hide Full Journeys
Vehicle Rego
Seats
Journey No.
Client Name
Pickup Time
Priority
Support Rating
Status
Pickup From
Appointment Time
Destination
Show Filter Options
Filter Options (Ctrl+F)
Hide Full Journeys
Contains:
Suburb
After:
Before:
Bookings
Journeys
Filter Bookings By Text, Suburb or Date
Filter Journeys By Text, Suburb or Date

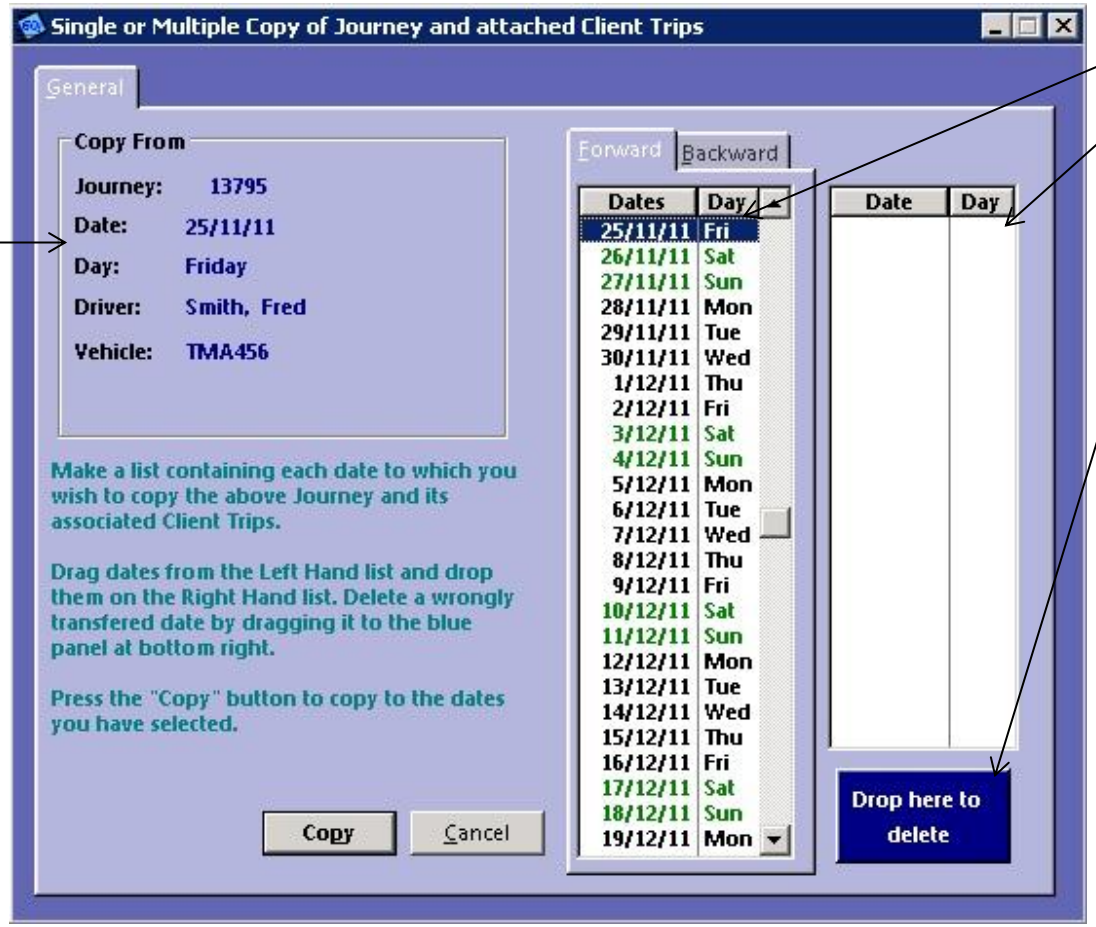


These functions can also be accessed by Right Clicking in the Booking, Journey or Trip Section. In the Journey and Trips Sections this will also display a Query option allowing you to specify the criteria for the records displayed.



Copy Forward Function

This Function is accessible from the Allocations Window and New Journeys Window.
It allows a Journey and all of its clients to be copied to one or more dates in a single action.

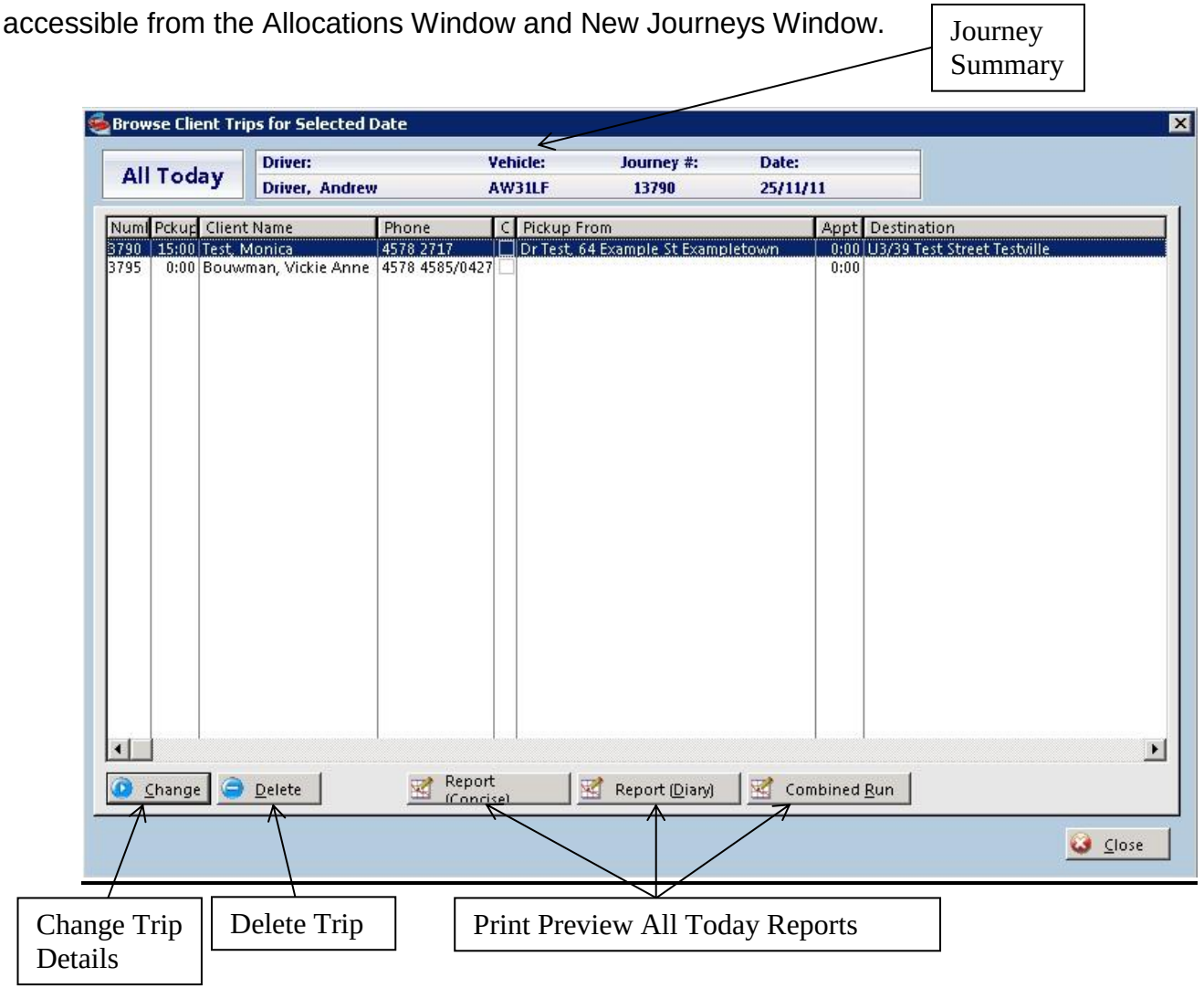


Journey Summary

Left Click and Drag the selected dates to the Right Hand List Left Click Copy when finished. If you would like to remove a date from the Right Hand List Left Click and drag it to the blue Drop here to delete section.

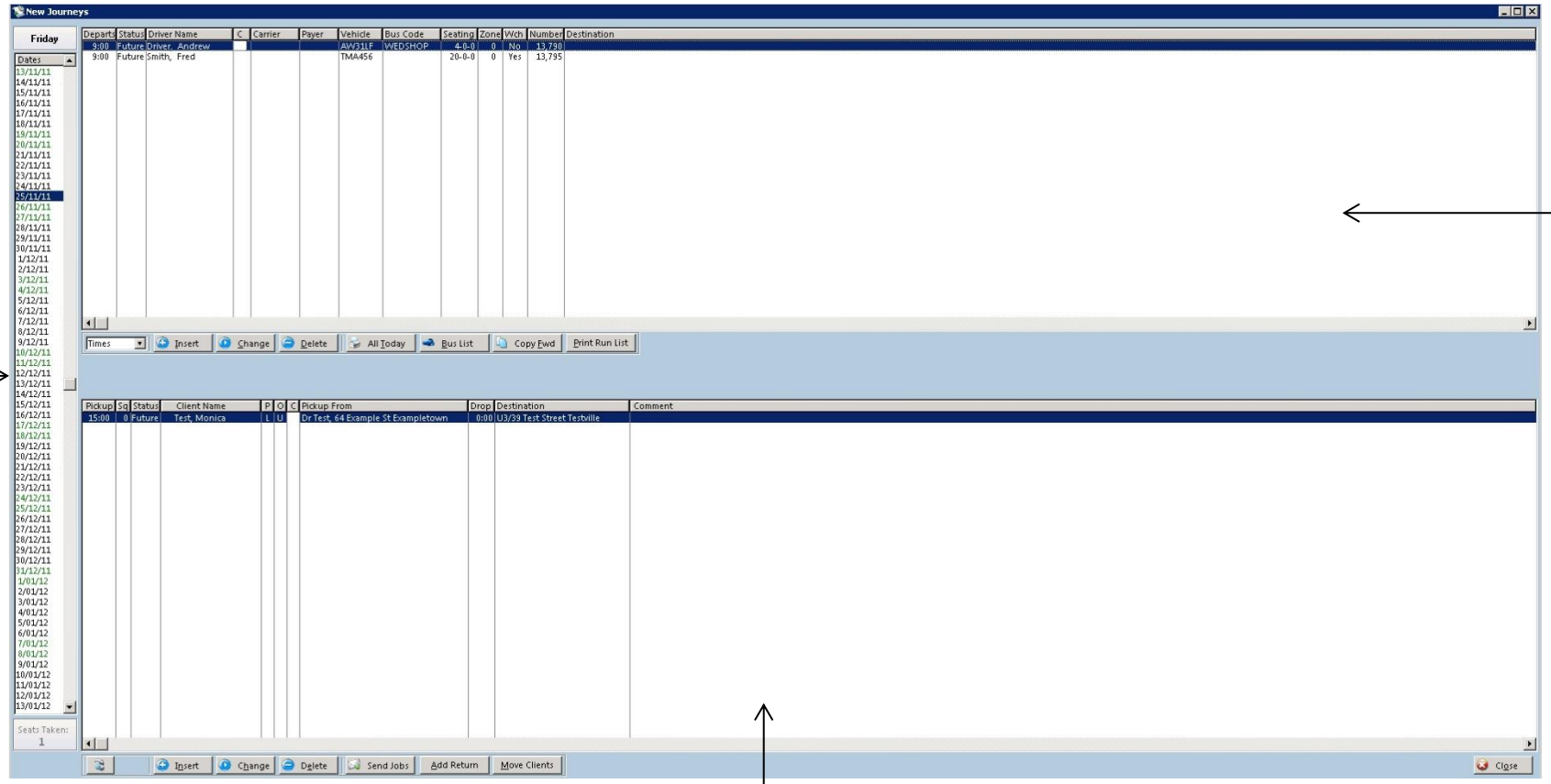
Print All Today Function

This Function is accessible from the Allocations Window and New Journeys Window.

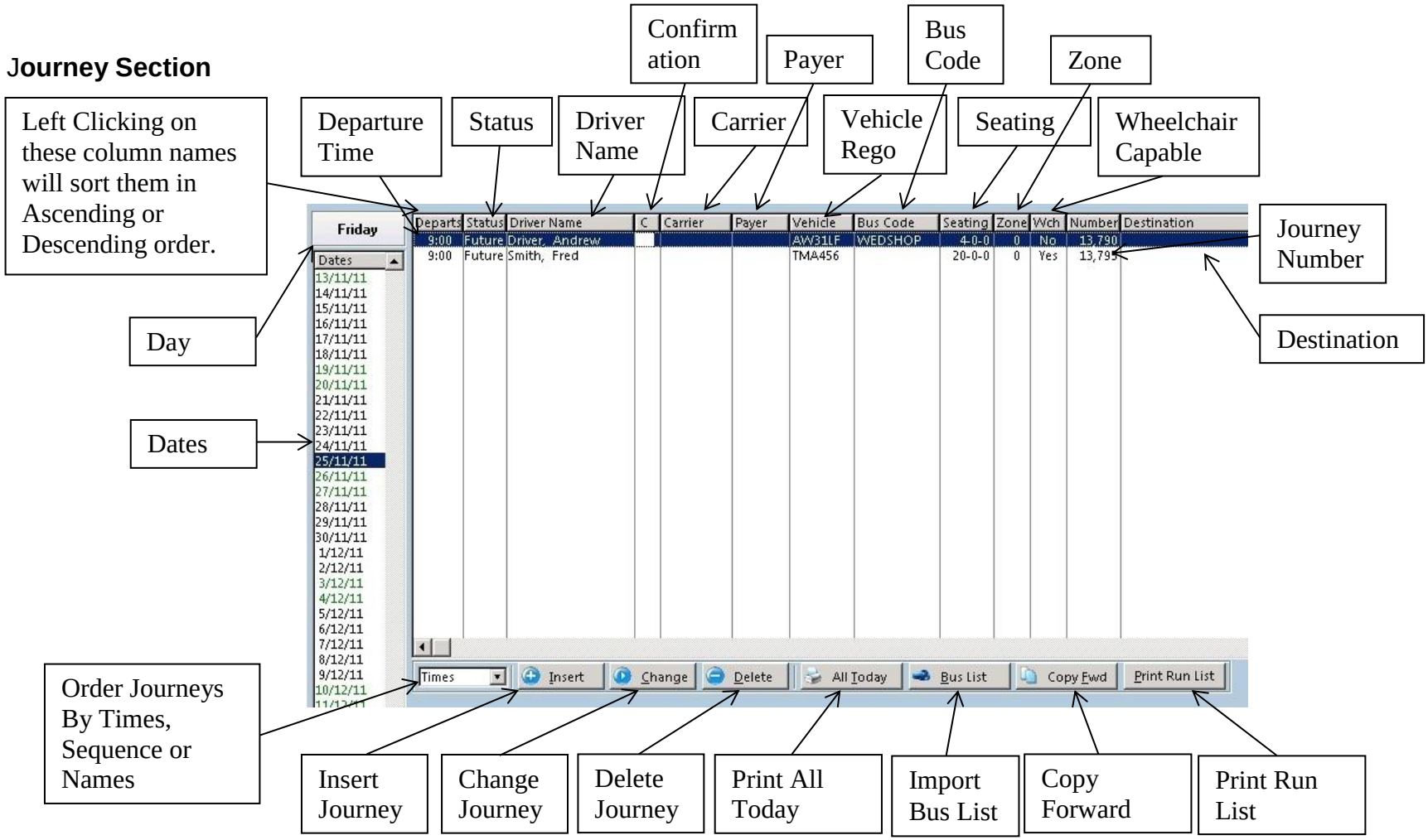

Journey Summary
Browse Client Trips for Selected Date
All Today
Driver: Vehicle: Journey #: Date:
Driver, Andrew AW31LF 13790 25/11/11
Numl Pckup Client Name Phone C Pickup From Appt Destination
3790 15:00 Test, Monica 4578 2717 Dr Test, 64 Example St Exampletown 0:00 U3/39 Test Street Testville
3795 0:00 Bouwman, Vickie Anne 4578 4585/0427 0:00
Change
Delete
Report (Concise)
Report (Diary)
Combined Run
Close
Change Trip Details
Delete Trip
Print Preview All Today Reports

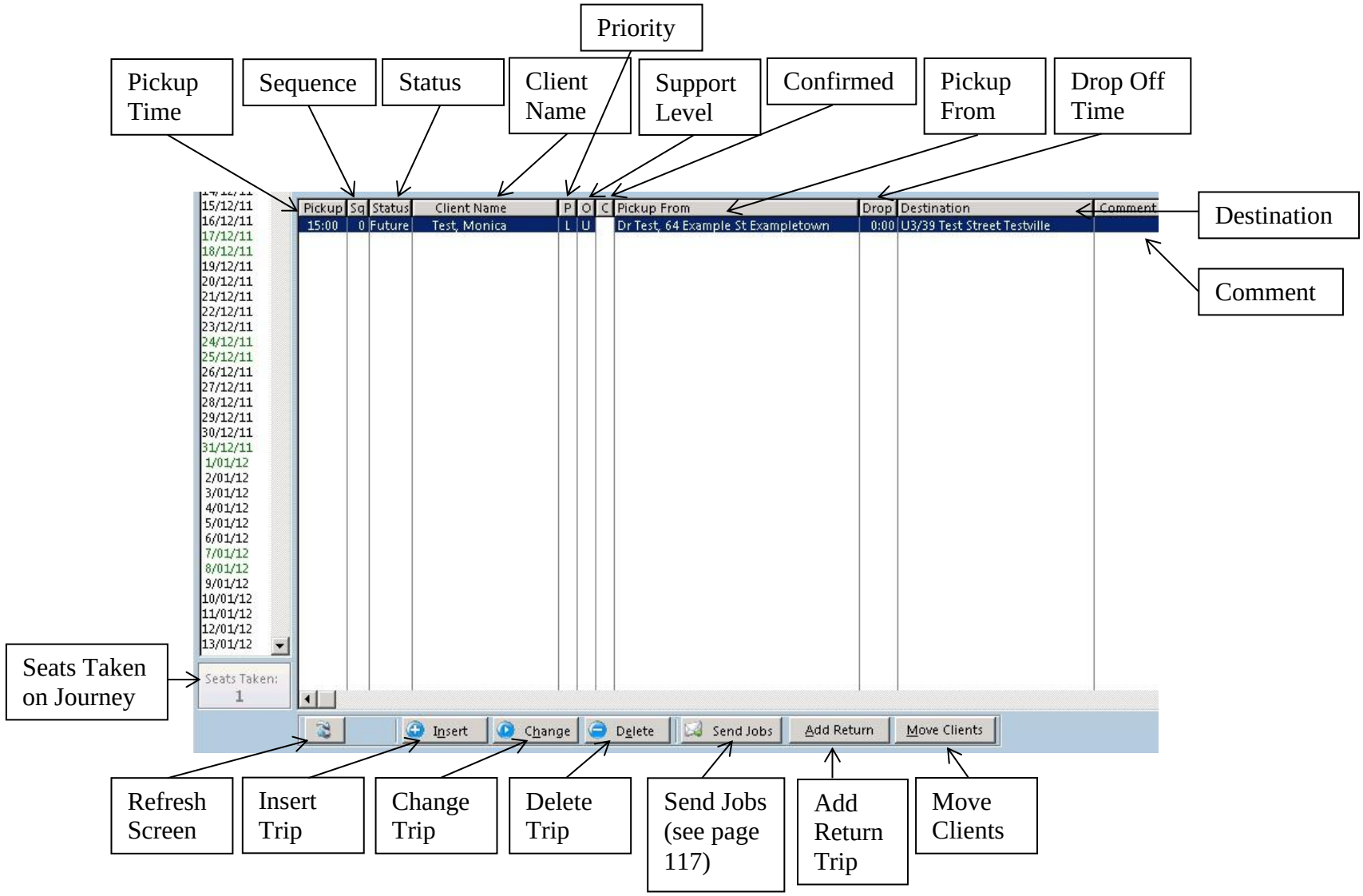
New Journeys (Transport->New Journeys)

This window will display your journey information. It will allow you to create or modify journeys and trips.



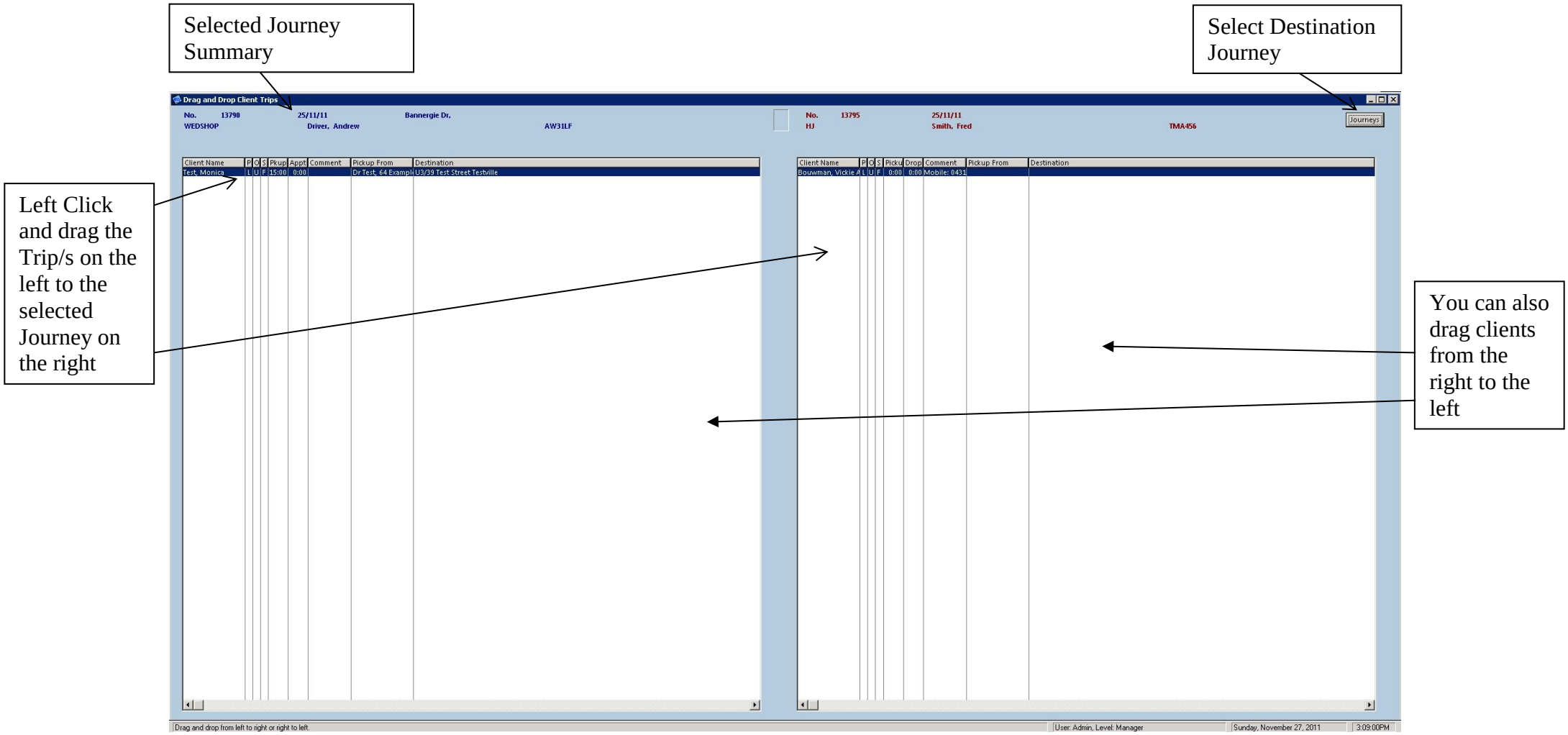
Journey Section



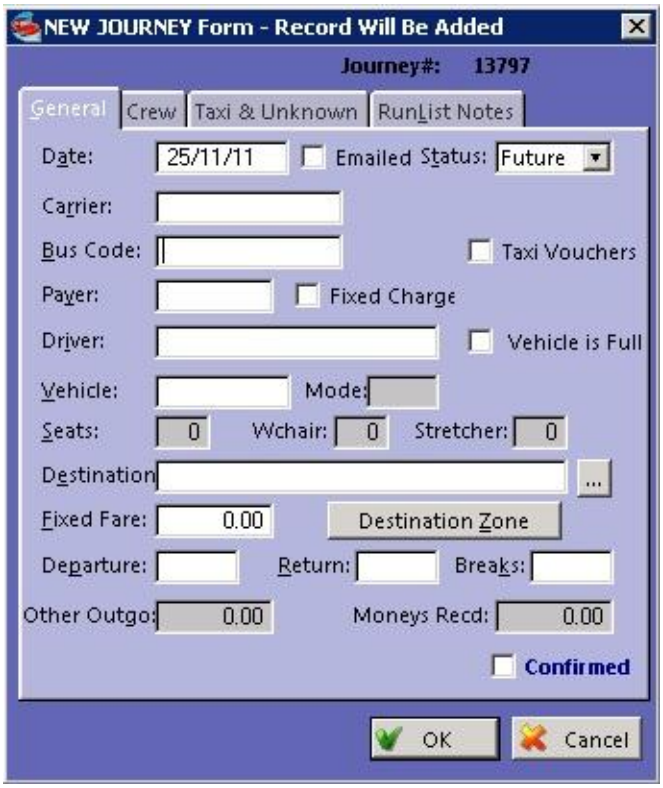


These functions can also be accessed by Right Clicking in either section.

Move Clients


Selected Journey Summary
Select Destination Journey
Left Click and drag the Trip/s on the left to the selected Journey on the right
You can also drag clients from the right to the left
Drag and Drop Client Trips
Journeys
Client Name
Pickup From
Destination
Comment
Drag and drop from left to right or right to left.
User: Admin, Level: Manager
Sunday, November 27, 2011
3:09:00PM

NEW Journey Form



Date:
Date of Journey

Emailed Checkbox
This box is ticked if you email this job using SendJobs. You may also tick it if you have emailed it manully.

Carrier:
This is the Carrier Code lookup. (See page 66)

Bus Code:
This is the Bus Code lookup. (See page 56)

Taxi Vouchers Checkbox
If taxi vouchers are needed or used check this box.

Payer:
This is the Payer Code. (See page 62)

Fixed Charge Checkbox
Tick this box if the charge for this Journey is fixed in advance or an agreed upon amount rather than a kilometre charge.

Driver:
Enter the driver name for this Journey. You can partially type in their last name and press TAB or ENTER to bring up a list of drivers. (See page 57 for Crew)

Vehicle is Full Checkbox
Tick this check box if the vehicle is full. The Vehicle will be highlighted in Yellow if it is full.

Vehicle:
Vehicle Registration. You can partially type the rego and press either TAB or ENTER to bring up a list of vehicles. (See page 63)

Vehicle Information:
Mode
Seats
Wchair
Stretcher
These are informational only based on the vehicle selected and cannot be changed on this screen.

Destination:
Destination of the Journey. You can partially enter the destination and press either TAB or ENTER to display a list or you can left click on the … browse button. (See page 61)

Fixed Fare:
If the Journey has a fixed fare enter it here if not leave it.

Destination Zone:
Not Used.

Departure:
This is the time of the departure for the Journey.

Return:
This is the time of the return of the Journey.

Breaks:
This is an allowance for breaks in a time format. Eg 1:00 for a lunch break etc.

Other Outgo: & Monies Recd:
These fields are greyed out and cannot be changed.

Confirmed:
Tick this checkbox if the Journey is confirmed with the driver.

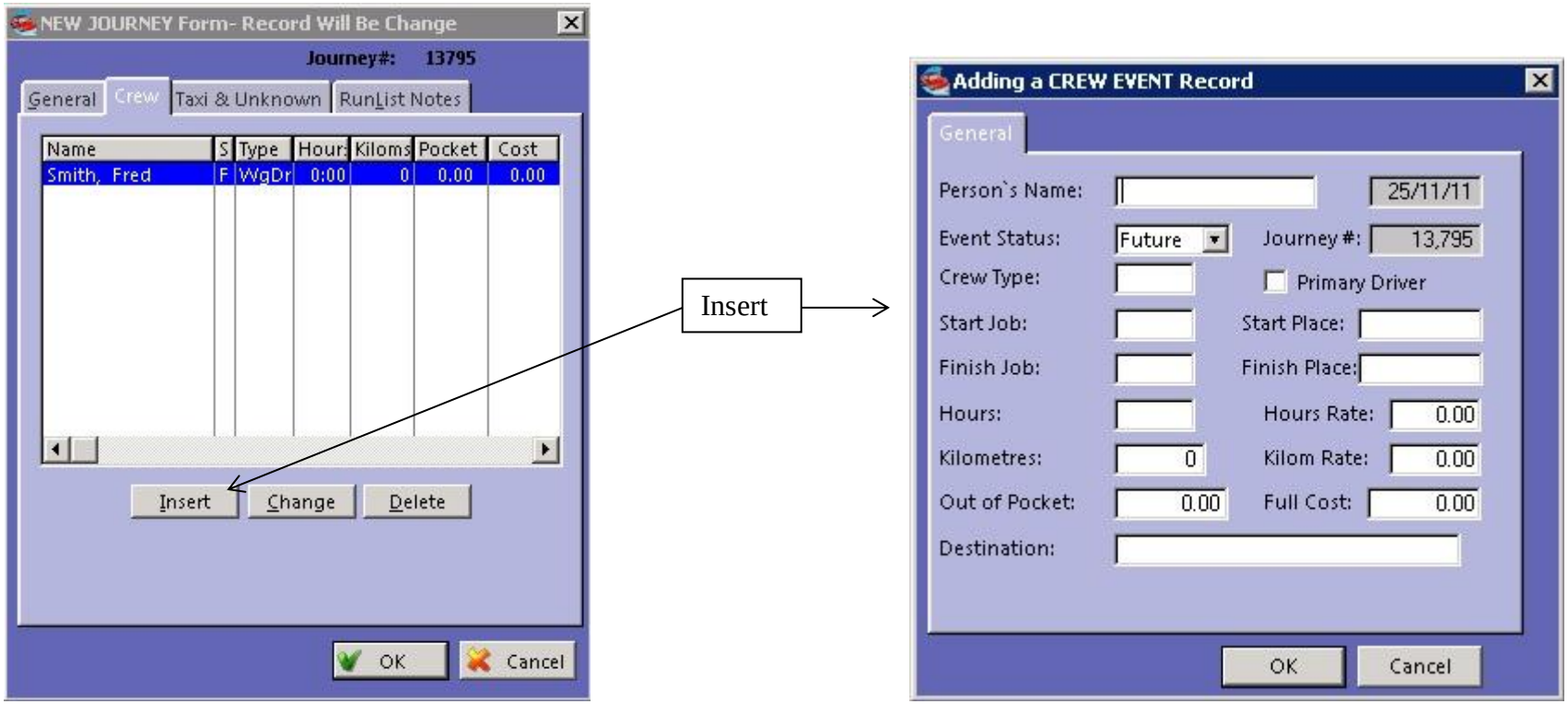
See the following pages for the *Crew Tab* and the *Taxi & Unknown Tab*.

Run List Notes
These notes will be printed at the top if the Run List for this Journey

New Journey Form

Crew Tab

Allows you to add additional crew to a Journey.

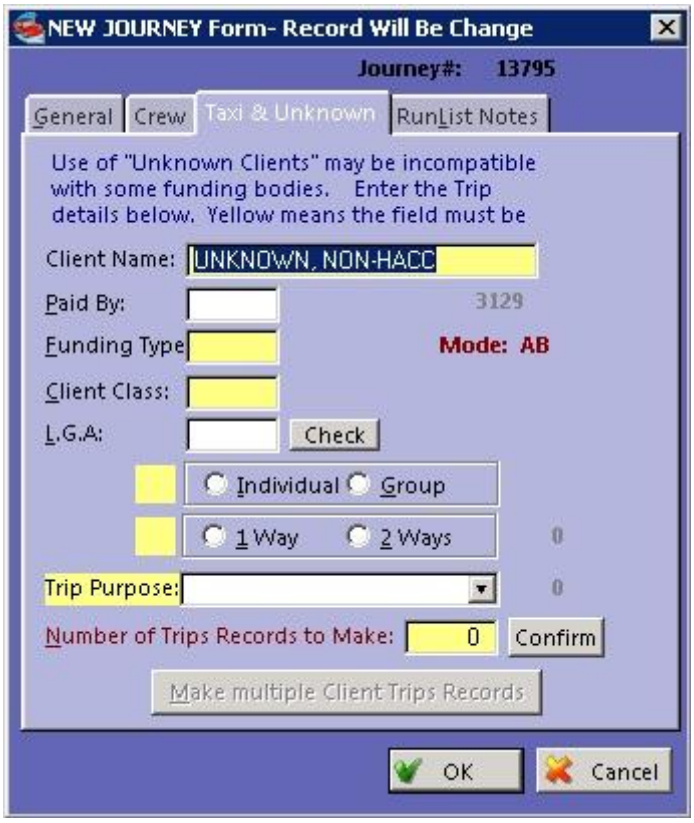


Fill in the Adding a Crew Event Record form to account for additional crew on the Journey.

NEW Journey Form

Taxi & Unknown Tab

Allow you to create multiple unknown client Trips easily. Yellow fields must be filled out.



If you wanted to create five unknown client Trips you would fill in the yellow fields as required, enter the number of trips to make in the *Number of Trips to Make field*, Left Click *Confirm* and Left Click *Make Multiple Client Trips Records*. This will then create multiple Trips in the selected Journey.

Verification (Transport->Register/Verify)

Only verified trips and journeys are transferred to TMA Central for your MDS submissions. You need to verify all transport supplied, verifying will provide your service with accurate reporting to both your own service and to appropriate funding bodies as required. The verification page enables a service to enter the amount of kilometres a vehicle used for a specific journey, monies received and spent.

It can also be used for calculating cost for your transport as it includes wages, cost per kms for a vehicle, out of pocket expenses and monies collected.

Verify from the Drivers' run sheets and enter changes if any from the run sheet; e.g. a return journey for a Client, a Client that had not been recorded on the run sheet, cancellation or a transfer to another vehicle. You are able to add, if you have not entered previously the reason for the Client travelling (Trips Purpose etc).

Click on **Transport** on the Main Menu, select **Verify/Register**. The Verification window will open.

Note: One third of the way down and just to the right of the date column is a drop-box that can be set to **Register** or **Verify**. When set to Register all journeys appear for the selected day, whether Verified or not. When set to Verify, only un-verified journeys appear. This feature is designed to help you rapidly see which journeys still need to be verified.

Firstly, select the date of the Journey then highlight the Journey itself, the client trips belonging to the journey appear in the bottom half of the page.

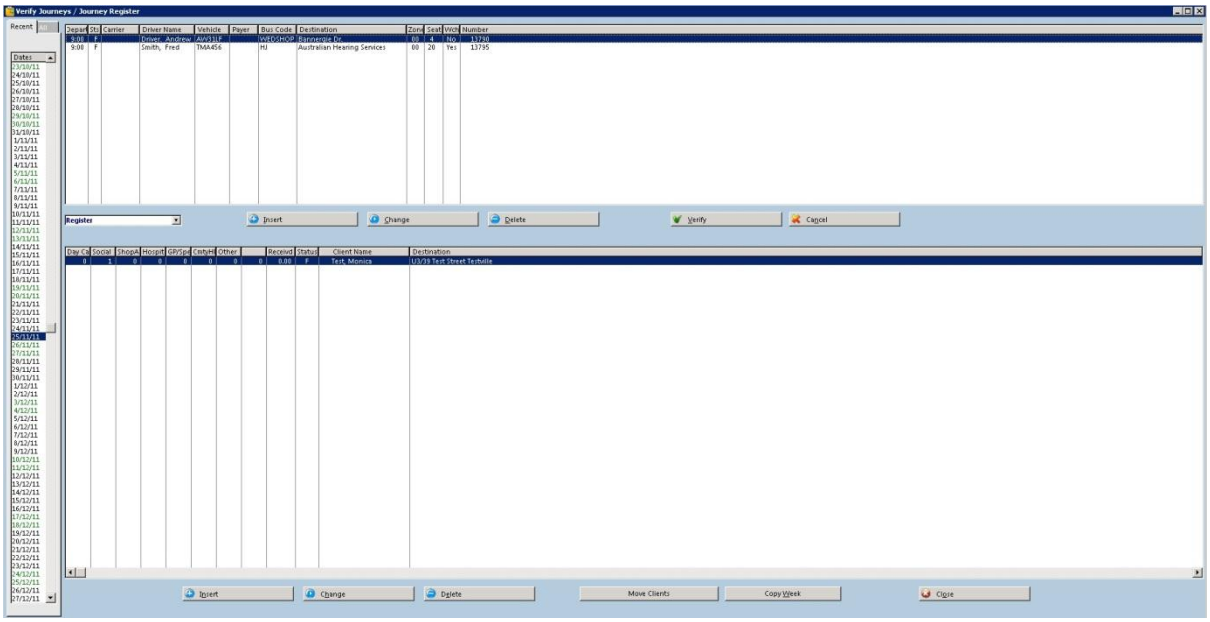
Next ensure the data in the program reflects what actually occurred for this journey. Make any necessary changes to the client trip information (bottom half of the page). This can include entering a new client trip, deleting a trip, changing the Status of a client trip if Cancelled, Unmet (entering appropriate code in the field next to Status when an appropriate selection has occurred) or Transferred. To make changes to a client's transport either double click on the client or highlight the client and click on **Change** along the bottom half of the page.

You are able to make changes to the vehicle, driver etc by clicking on the **Change** button along the bottom of the first half of the page.

To **delete** a Journey, highlight the appropriate journey then click on the 'Delete' button along the button line at the bottom of the top half of the page. **If you choose to delete a journey all client trips allocated to the journey will also be deleted.**

You can make changes to any Journey or Trip whether it has been verified or not as long as the MDS has not already been submitted for that period. If you re-verify a record that has already been transferred to TMA Central, but the MDS has not been sent, you can run the "Transfer Service Events to TMA Central" to update the records.

Check the top section of the page; reviewing your information, ensuring data is entered correctly. To review this information highlight appropriate journey, double click or select **change** for the information to appear.



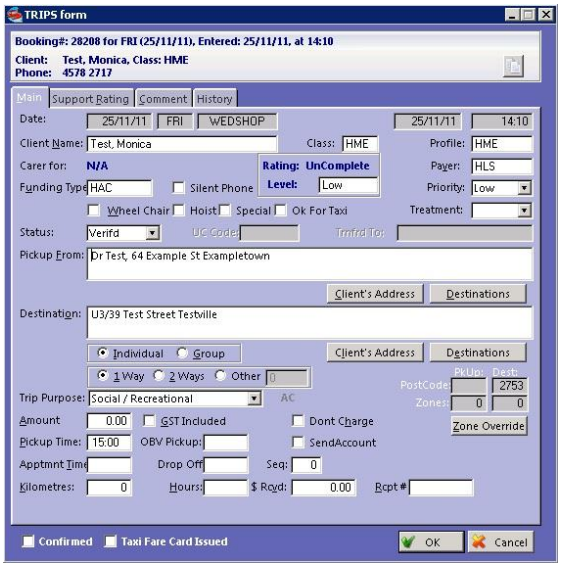
Ensure all clients have been entered with correct information in the lower half of the page. If changes or additional information are required for a client, highlight the client then either double click or click on the **change** button below the client list.

Review all data entered making the appropriate changes were applicable. For example if a client for this particular trip travelled using another source of funding other than shown, you are able to make the changes in the fields, **Class, Funding Type and the Payer.**

If a client changed the **purpose** of their trip you are able to change the preferred purpose.

If a client has travel 2 ways and not 1 way you are also able to make changes reflecting their transport.

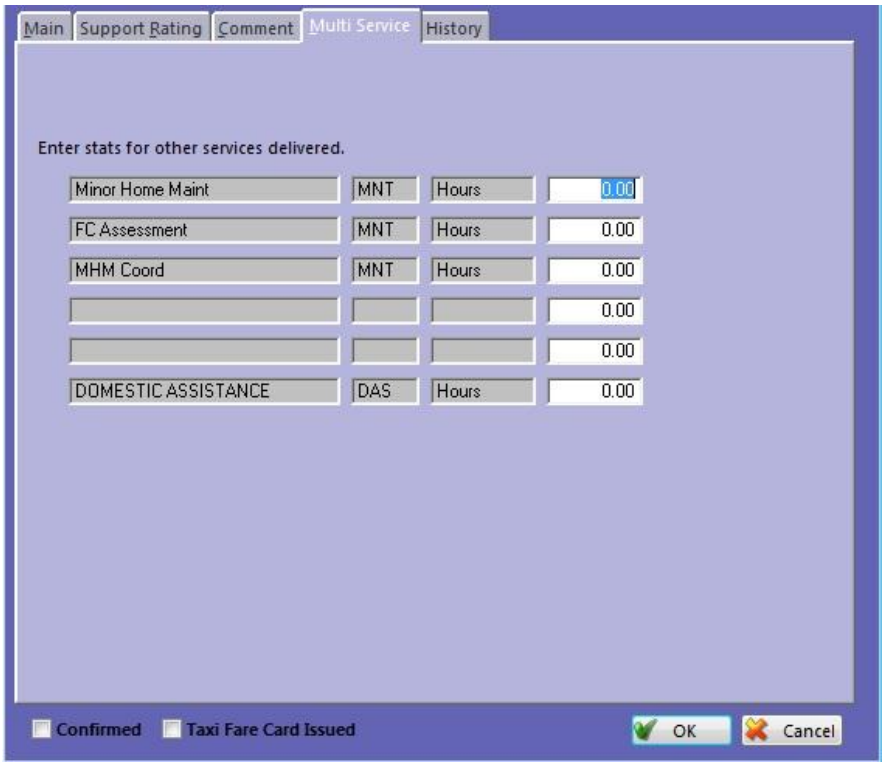
Enter their kms travelled; hours taken to provide their transport and monies received thus providing a service with reports for specific funding bodies e.g. Health Dept and Veteran Affairs.



When you have completed your changes click on OK.

Entering Multi Service Stats

If the Activate Multi Service setting is enabled in control settings and the additional services have been setup you will also see the Multi Service tab in the verify Trips Form. If other services have been delivered you must enter them into this form. These stats will be submitted in your MDS report from TMA Central.



Change the 'Status' of a client.
To change the status of a client you will need to select from the 'Status' drop down box with the pre-programmed selections. These selections are **Future, Cancelled, Transferred, Unmet and Verified.** Most services will use Cancelled and Unmet selections, thus enabling a service to produce valuable reports regarding this information and supplying funding bodies with statistics identifying problems or issues a service maybe experiencing.

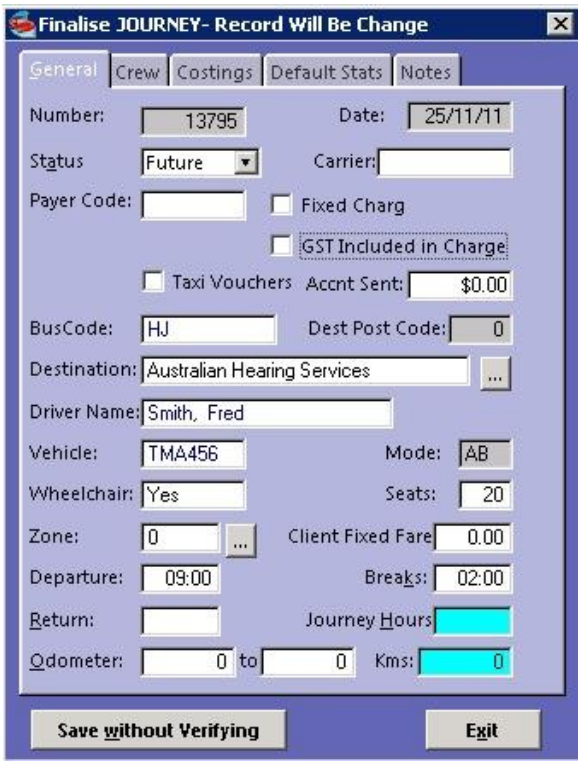
Once you are satisfied you have all the data entered correctly click OK. The client will still appear on the verification page until verified. A verified journey will still appear in the New Journey's page and if required changes are to be made after the verification you will need to access the Register page. **Changes can be made in the Register and re-verified**.

Final Steps When Verifying

Final steps for verification;-Open the verification page click **'Verify Highlighted Journey'**, the page below will open. Next you will need to step through the buttons along the top of the page ensuring all your information has been entered correctly and changing information if required.

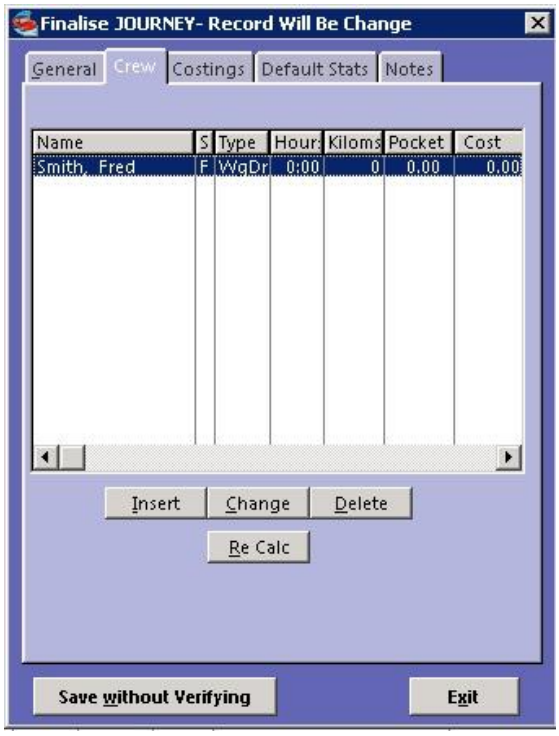
In the first page enter the odometer reading for the journey. If you do not have the odometer reading but know how many kilometers the journey took you enter the amount in the second odometer field, this amount will then appear in the aqua field labeled **Kms.** If you wish to keep concise driver and vehicle hours enter the Breaks and Return Time for the vehicle.

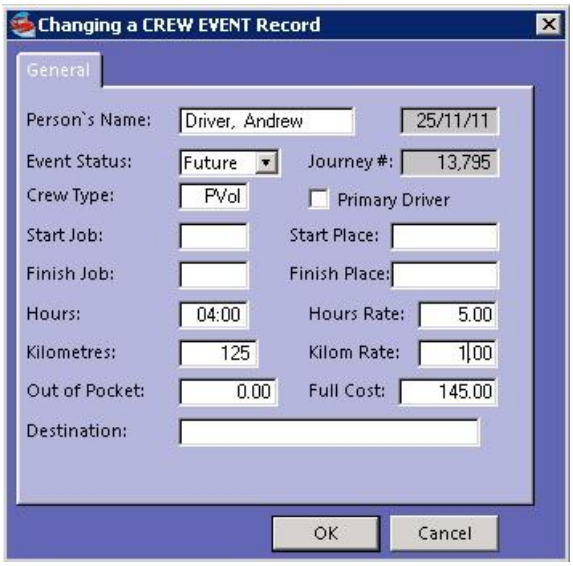
NOTE: If you have Trips OBV Units most of these fields will be entered automatically.



Now click on **Crew** (second tab).
The second page contains the Driver's costs and Driver Type. You are able to edit this information by highlighting the Driver and selecting the Change button(see page below where changes are able to be made).

You are also able to enter a second driver or helper for a journey. Click on Insert and enter appropriate information for the crew member then click on OK. The second member entered will appear under the primary driver in the Crew list.
Crew members may be re-reimbursed for expenses in different ways; this is recorded in the Crew Event record. Most services keep records of the hours and various costs volunteers accumulate, therefore entering their activities assists in costing a journey and formulating information for specific reports.



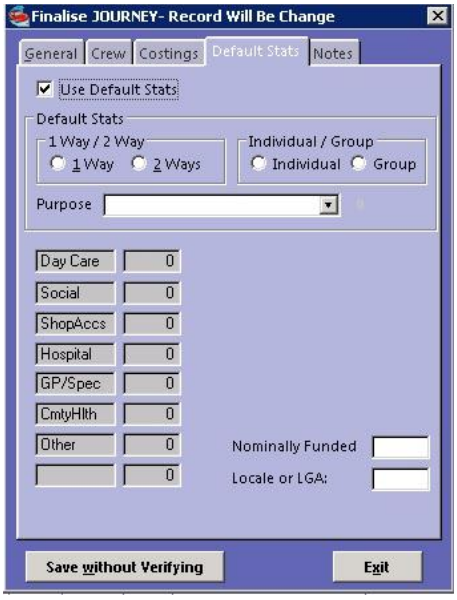


How Trips Calculates Costing

The Crew record window allows you to enter an hourly or kilometre rate of re-embursement for each driver. With Own-Vehicle Volunteers (OwnV) you only need to enter these if they are in variance with the "Vol Cost perKm" field in the Control Settings. If the "Kilom Rate" field in a "OwnV" Crew record is nil than the amount in the "Vol Cost perKm" field will be copied to the Crew Event form when you select the Driver for the Journey.

As "OwnV" drivers are driving their own vehicle the recording of the vehicle and driver costs (to your service) are recorded in the Crew Event form. The total of these are transferred to the Journey record as Crew Costs.
Project Volunteer (Pvol) crew are often simply re-emburesed for lunches and/or travel to and from the service and Trips doesn't need an hourly rate or a kilometer rate in the Crew record for these. In the case of "Pvol" or "WgDr" the cost of the vehicle is shown in the "Vehilce Cost per Km" in the "Journey Kiloms" box in the "Costings" page of the "Finalise Journey" form The "Vehilce Cost per Km" field in this section gets its value from the "Cost per Km" field in the Vehicle form, but can be overwritten manually.

The **Defaults Stats** section allows you to enter Trip Purpose etc for a group journey. This is generally not used but is available for groups who may all be attending a social outing or on a shopping run. Tick the "Use Default Stats" checkbox.



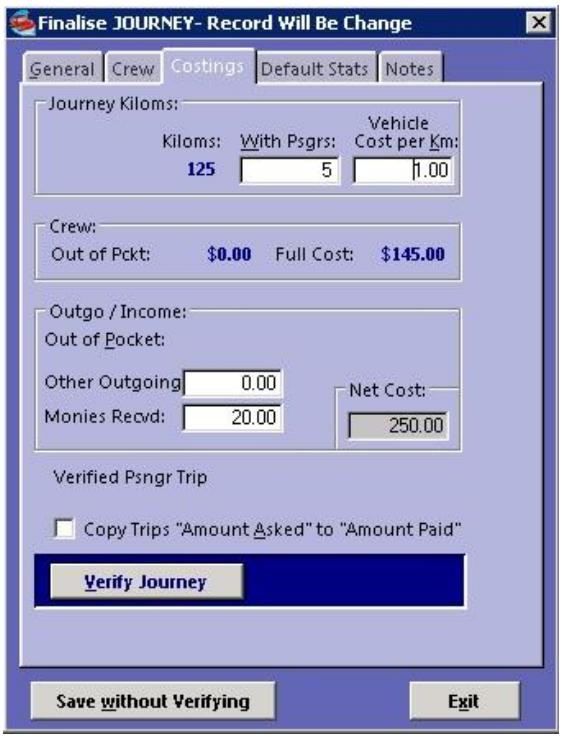
Enter the stats by using the 1-way/2-way, Individual/Group choices and the Trip Purpose drop-box. When completed, click on **Costings** for the final verification step.

The final step in verification is processed on this page.

The Kilometres you entered on the **General** page now appear under the Kiloms as does Vehicle Cost per klm as does the Crew cost. Enter any other outgoing monies and monies received from all the people on this journey.

The program automatically calculates the information you have entered and provides a Net cost for the journey, however this figure is not accurate without the Vehicle cost per kilometer being filled in and other costs in the **Finalise Journey** form being filled in properly.

When satisfied all relevant information has been entered, click on **Verify Journey.** The Journey information for drivers, vehicles, clients etc will now become verified.



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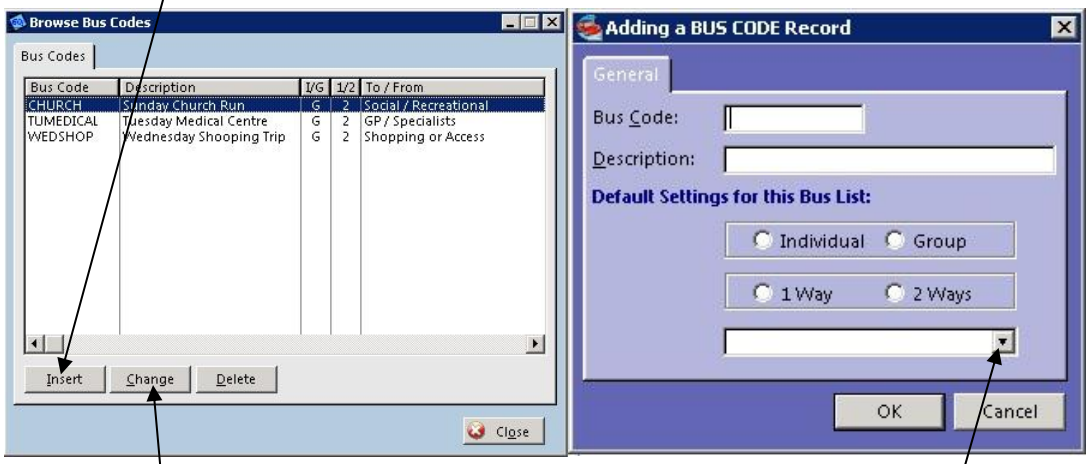
Bus Codes (Data Files->Bus Codes)

Bus Codes refer to any regularly scheduled transport activity, like bus routes in any state or commercial bus service.

You must enter Bus Codes before you are able to use the Bus Lists option. Once a Bus Code has been entered you are then able go the Main Menu then *Transport/Bus Lists* to enter a ready-to-copy list of clients for that Bus Code.

E.g. if you provide a regular shopping run with permanent clients booked on the run you are able to enter them on a Bus List which you then transfer into New Journeys. Bus Codes can also be created to identify and report on a regular transport activity even if you don't make a bus-list for it. Each Bus Code must be unique and ten characters or less. If you have a lot of regular runs it pays to create all your Bus Codes carefully on paper before entry, so they are as descriptive as possible.

To access Bus Codes click on **Data Files** and select **Bus Codes**. To enter a Bus Code click on insert.



After clicking on insert the **Adding a BUS CODE Record** form opens. Enter a **Bus Code** that is easy to identify e.g. CHURCH.

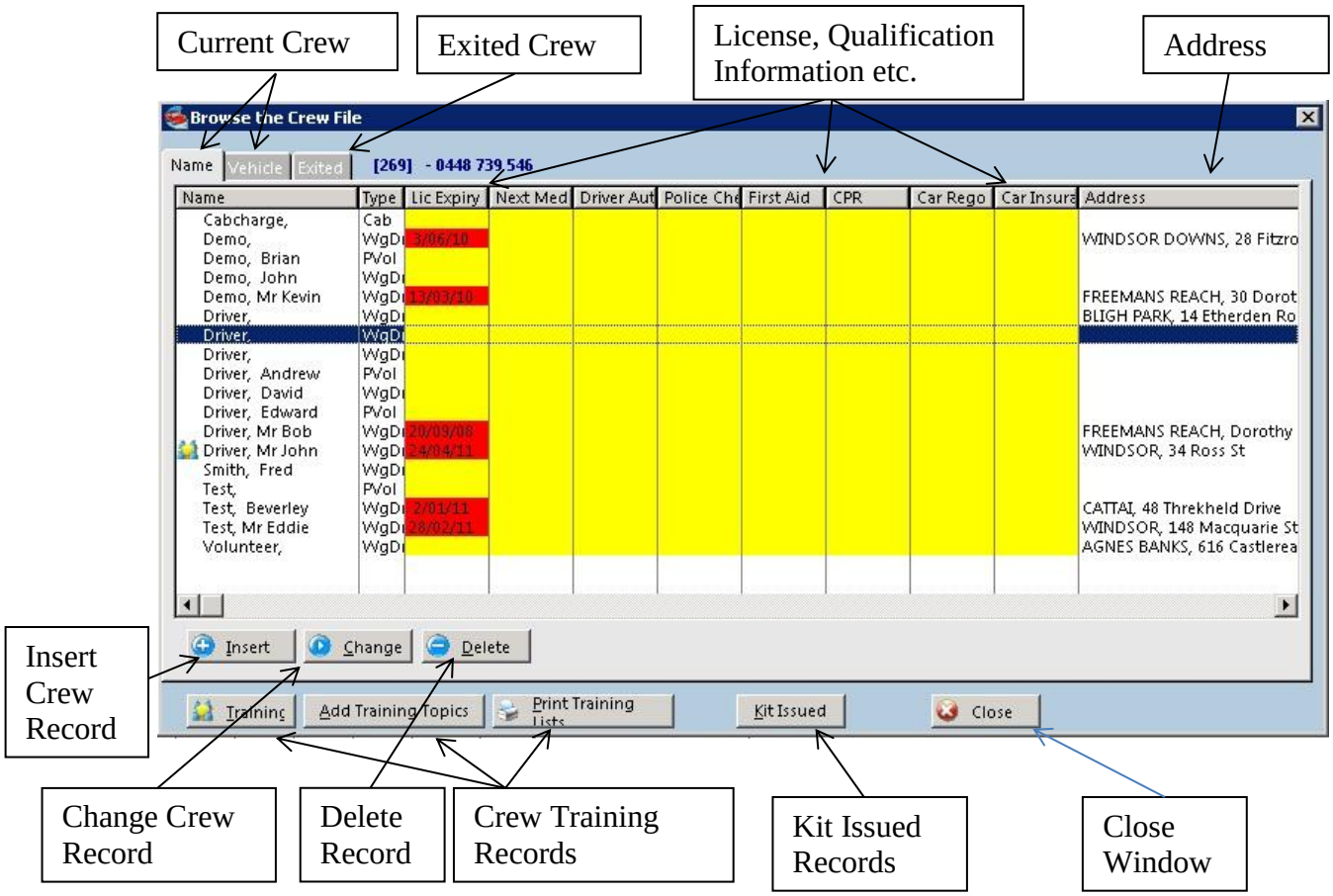
You are than able to enter a description such as Sunday Church run, then select (optional) if group or individual, if one or two ways and the **purpose** of the journey e.g. social and recreational.

Once you are satisfied with your entries click on OK and the new code will appear in the Browse for Bus Codes. You're able to change your entries for a code by selecting **Change** along the bottom of the Browse Bus Codes option.

Repeat this process for all Bus Codes required by your service. You are able to enter unlimited number of Bus Codes.

Crew (Data Files->Crew)

All persons driving vehicles or assisting in client care for your service need to be entered as Crew Members. Once a person is entered as Crew you are able to enter them against journeys or an activity the person has under-taken. **Current Crew Members** are listed in the Browse the Crew File.
Note the different colours. E.g. Project Volunteers appear as blue.
When entering a crew record you are able to enter personal details such as their address, contact numbers, whether they are a volunteer or wage driver or a driver of their own vehicle, license details, medical dates and notes for that crew member e.g. availability, incompatibilities with clients or vehicles.



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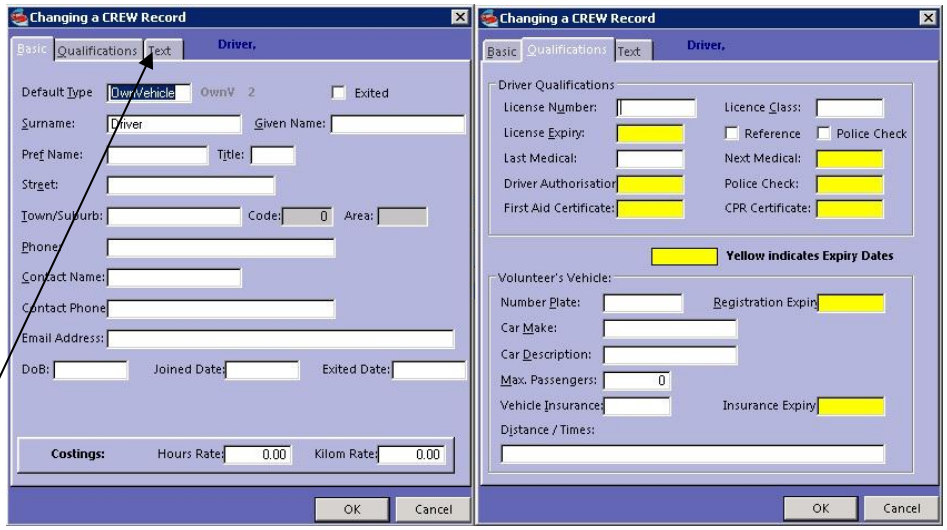
Insert or Changing a Crew Record

When you have entered the Crew Member's basic details and have selected what **type of Crew member** they are click on **Qualifications** to enter license details. See window below.
If a Crew Member uses their own vehicle and you give them "OwnV" status you can then enter the details of their vehicle.



To enter information against the Crew Member in the Text section simply click on **Text** and enter the appropriate information. You are able to make changes and updates in this section when required.
If a Crew Member leaves the service you will need to exit the Crew Member.
Simply click in the small box next to **Exited** and the Crew Member will move to the exited Crew List. You are able to retrieve the Crew Member from the exited list at any time by unclicking the exited option.

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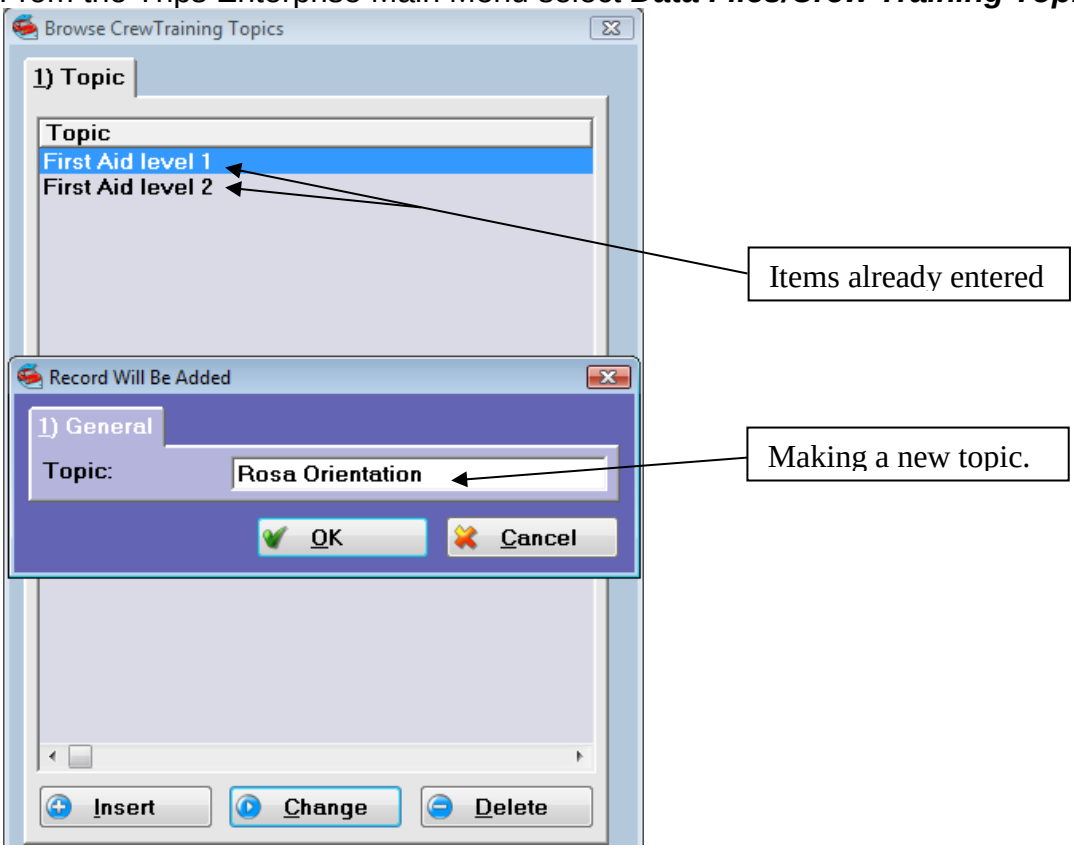
Crew Training Topics

This feature is designed to keep track of training and other requirements for crew (drivers, helpers etc) It allows you to make a Training Topic template. This is a list of requirements that can be copied into each crew member's training list. You can then keep track of when crew are scheduled to do training actions and when they have completed them.

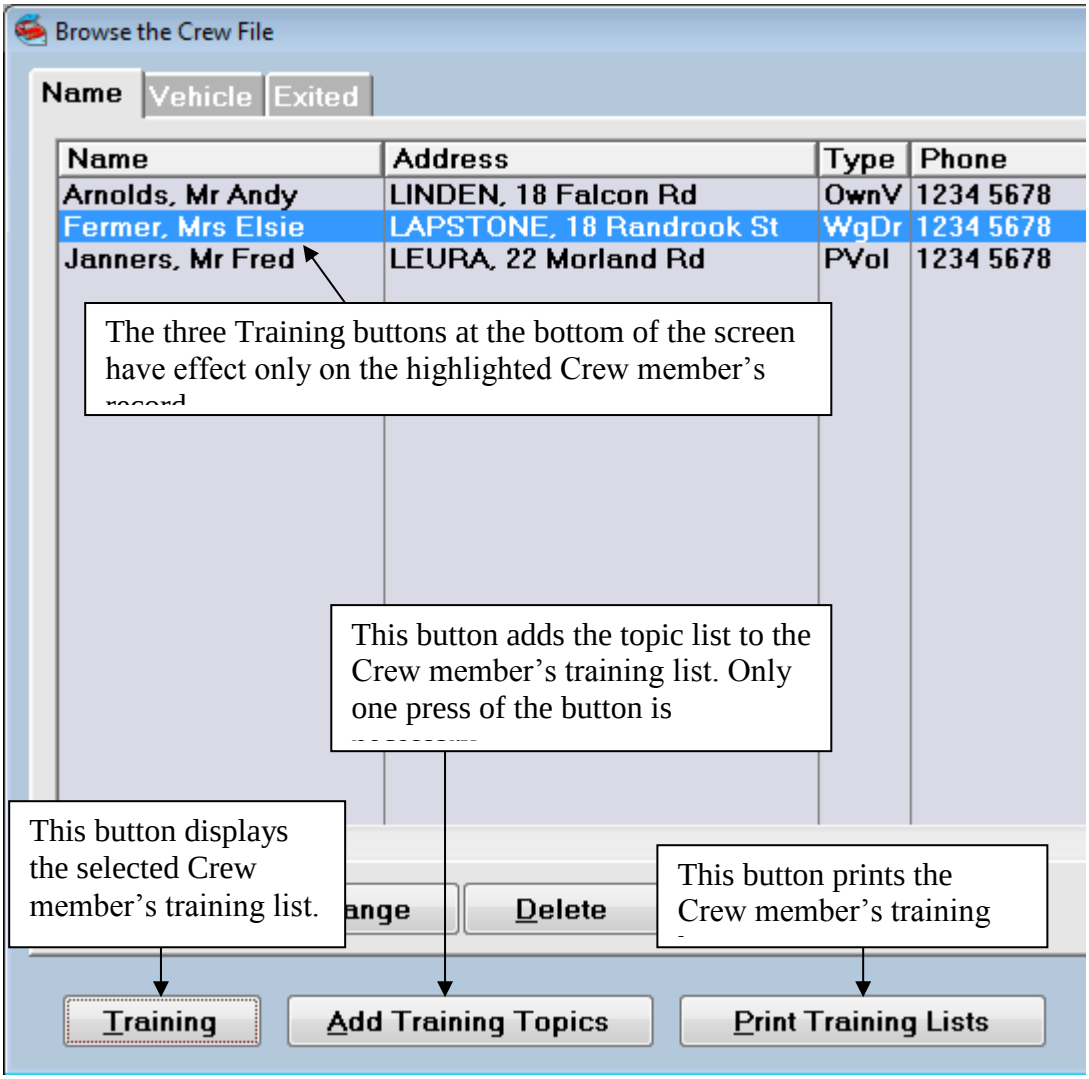
Business Rules:
You must have entered a person into the Crew list in Trips. They will then have an empty Training list. You can copy the Training Topic template into each person's list in turn. If you have added items to the template, you can copy the template again to each crew member again. It won't disturb existing entries but only add the new ones. This feature is available in Trips Enterprise from version 9.21.x on.

Making the Training Topics template:
From the Trips Enterprise Main Menu select ***Data Files/Crew Training Topics***. The

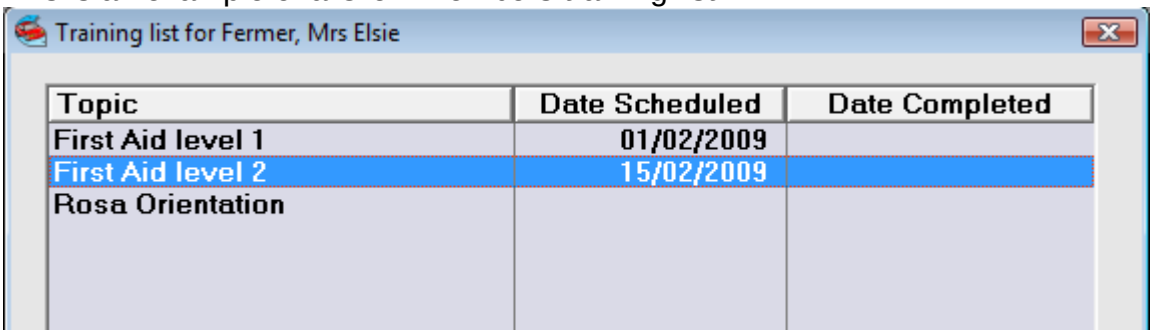


Once you have a Training Topics template you are ready to apply the template to various crew members Training lists. In the "Browse the Crew File window click on the "Add Training Topics" button.

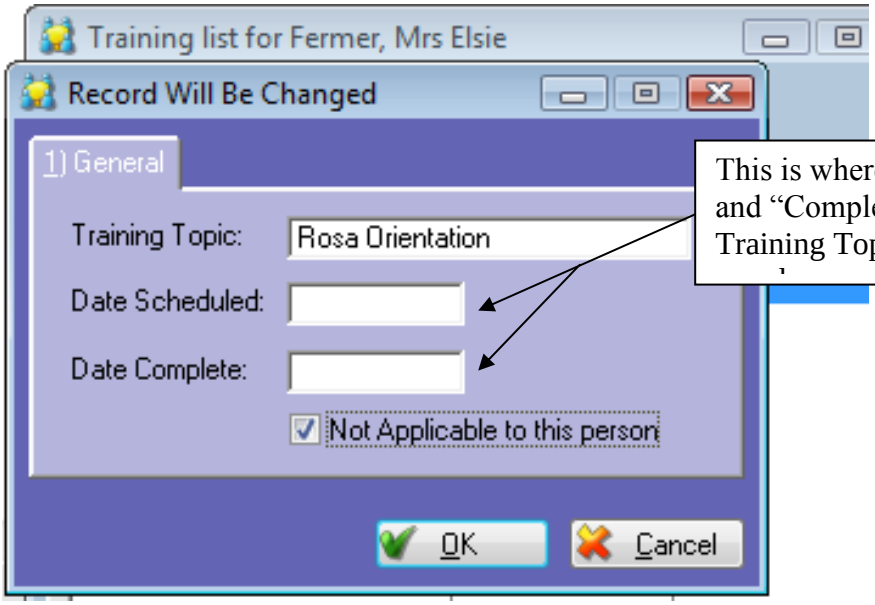
Administration of Crew Training records



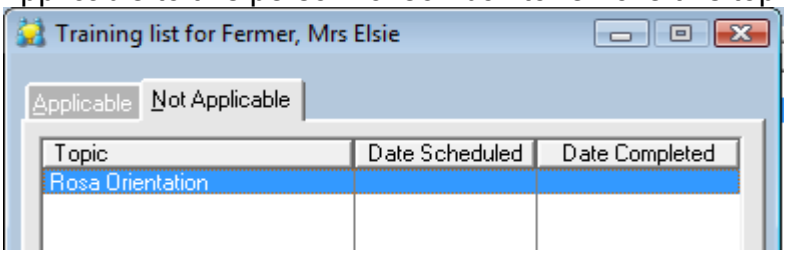
This is an example of a Crew members training list.



The dates are entered or modified by opening the form for this list. Click on the "Change" button at the bottom of this window.
The "Training List" form:


Training list for Fermer, Mrs Elsie
Record Will Be Changed
1) General
Training Topic:
Rosa Orientation
Date Scheduled:
Date Complete:
Not Applicable to this person
OK
Cancel
This is where you enter the "Scheduled" and "Completed" dates for a particular Training Topic for the selected Crew

However, not all topics are applicable to a Crew member. Let's say Elsie is a helper and didn't have to know all the details about the Rosa bus. You can tick the "Not Applicable to this person" check-box to remove this topic from the "Applicable" list.



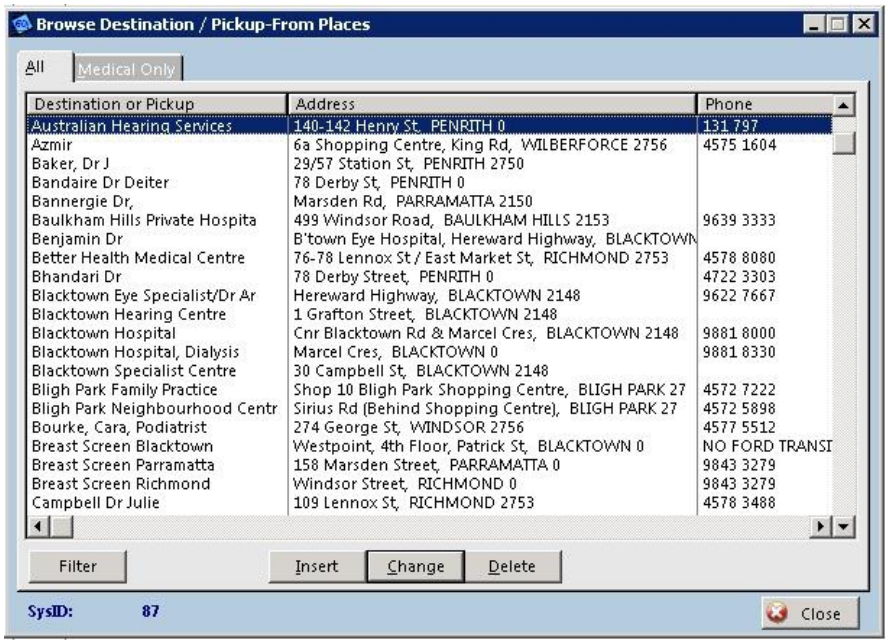
The topic pops into the "Not applicable" list and is no longer visible in the "Applicable" list for the Crew member

Note: Because the topic is in the Not-applicable list it doesn't get added to this person's list again when you click the "Add Training Topics" button. You don't have to worry about this topic for this crew-member again.

However let's say Elsie become a driver. You would simply take the "Not applicable" tick off all the items in the "Not applicable" list and they would then be resurrected in Elsie's "Applicable" training list for use.

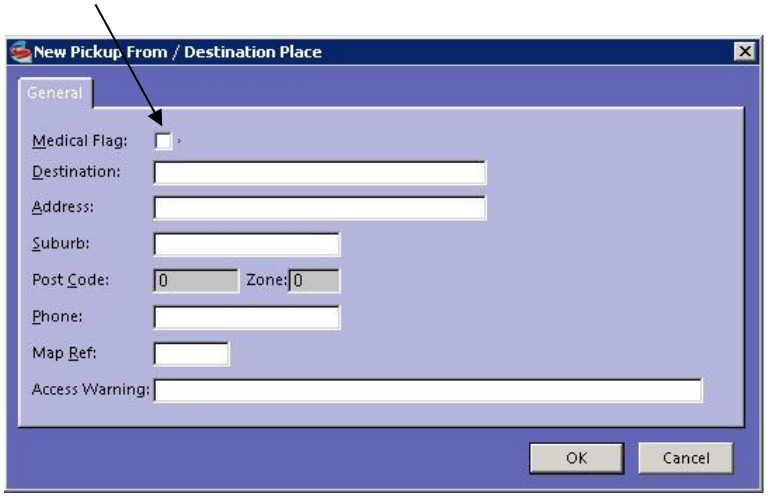
Destinations (Data Files->Destinations)

The Destination File will assist you with data entry when entering trips for clients. Enter all destinations your service regularly attends, for example Doctors, Specialists, Shopping Centres and other regular drop off and collection points. Creating a Destination list will save you time and improve data accuracy.



To create a new destination click on **Data Entry** then select **Destinations**. The **All Destinations** list will display.

If you flag it as medical destination it will appear (and can be printed) in a separate list for medical destinations only, while remaining on the All Destination list. To **flag as a medical destination** click in the small Medical Flag box.

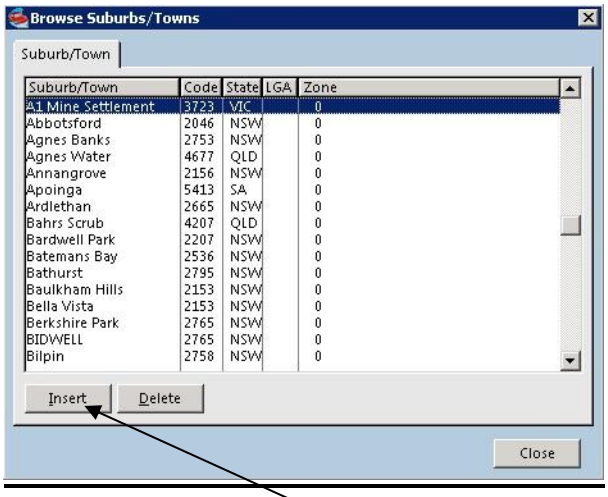


Enter all details in the fields provided. Once entered click OK and the new destination will appear in the Destination Browse File.

Locations (Data Files->Locations)

The Browse Suburbs & Towns window will appear when you want to add a suburb or town (location) to a Destination entry. It also appears when you want to add a suburb or town to a Client record in “TMA Central”.

The idea is to make a list of the suburbs and towns that you use in your area because most people don’t want to look up the Australian Postcode list with 16,440 items.



To enter a new suburb or town (location), click on insert. You then have access to the full Australian Postcode list.

Now, type the beginning letters of the location you want to add on your keyboard. Don’t click in any boxes first, just type the letters on your keyboard. Use the Back Space key if you make a mistake. When you have typed enough letters you will have found your location. Often a location name will appear several times because it exists in several states. Make sure you select the right one.

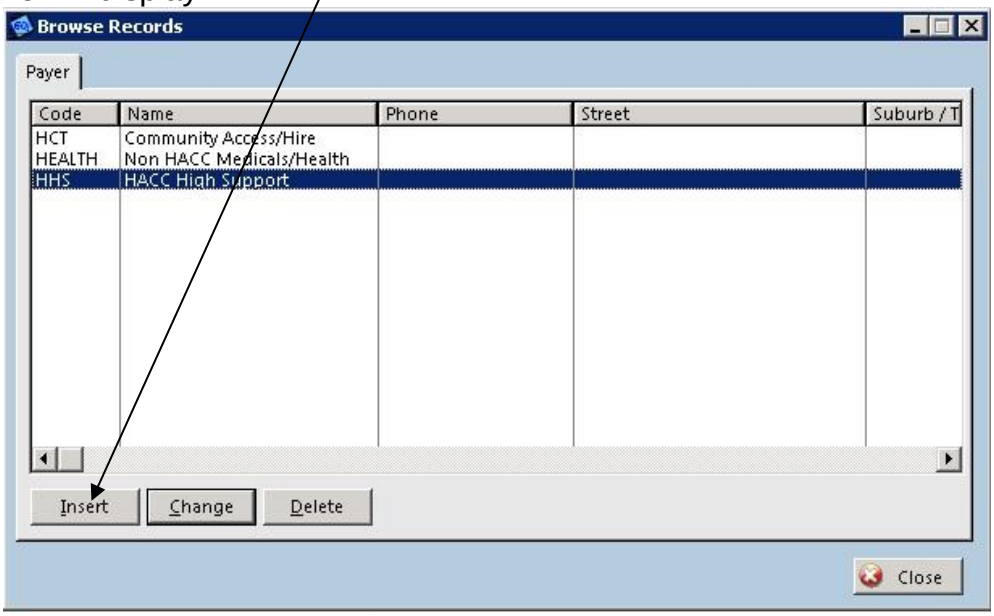
New suburbs are appearing all the time. Usually you can find them in the

Australian Postcode list but sometimes you can't. Brand new suburbs usually take on the postcode of a location nearby. Locate the nearby suburb from the Australian Postcode list in the manner described above. **Click on the Suburb/Town field and delete the towns name displayed**. Type in the name of the new suburb you need to enter, then tab to the next field or press OK.

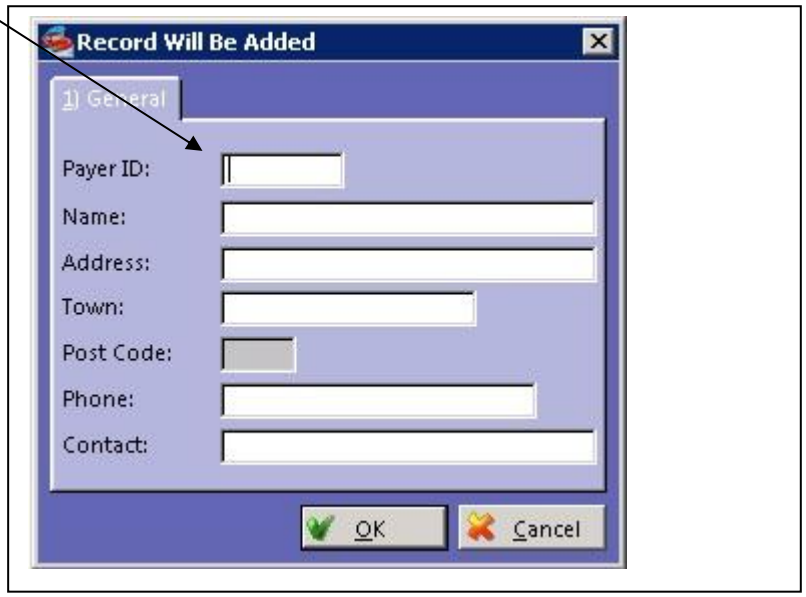
If your service area covers several LGA's (Local Government Areas) then it may be a good idea to enter the LGA code for each location in your service area. This way you can report your production statistics and client numbers separately for each LGA.

Payers (Data Files->Payers)

Payers are organisations that pay your service to transport people. Payer codes are used to print billing sheets or invoices for these organisations.
Select **Data Files** than select **Payers**. The browse page file below will appear.
To enter a new payer select **Insert** along the bottom of the page. Adding a payer record file will display.



The **Payer Code** is your first field you need to fill-in. Abbreviate the name of the payer to something easily recognisable and enter. Tab down the other fields and fill-in the appropriate information for each field and then click on OK. Repeat this process for each payer you have for your service. Each new payer record will display in the payer browse file.



If an individual is paying for their own transport use the “Send Account” facility in the Client record.
This information will allow you to create reports for accounting purposes and also assist drivers as to who pays for the transport when collecting contributions.

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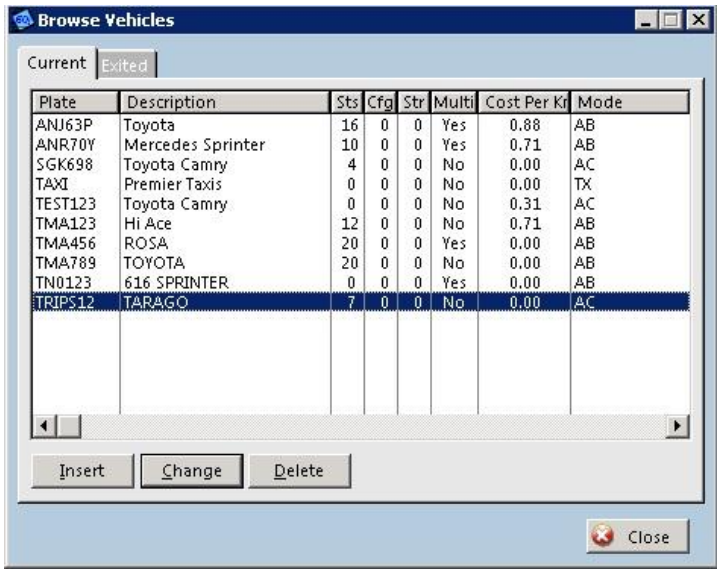
Vehicles (Data Files->Vehicles)

Enter all vehicles owned, hired or volunteered by your service in this section.


Browse Vehicles
Current
Exited
Plate
Description
Sts
Cfg
Str
Multi
Cost Per Kr
Mode
ANJ63P Toyota 16 0 0 Yes 0.88 AB
ANR70Y Mercedes Sprinter 10 0 0 Yes 0.71 AB
SGK698 Toyota Camry 4 0 0 No 0.00 AC
TAXI Premier Taxis 0 0 0 No 0.00 TX
TEST123 Toyota Camry 0 0 0 No 0.31 AC
TMA123 Hi Ace 12 0 0 No 0.71 AB
TMA456 ROSA 20 0 0 Yes 0.00 AB
TMA789 TOYOTA 20 0 0 No 0.00 AB
TN0123 616 SPRINTER 0 0 0 Yes 0.00 AB
TRIPS12 TARAGO 7 0 0 No 0.00 AC
Insert
Change
Delete
Close

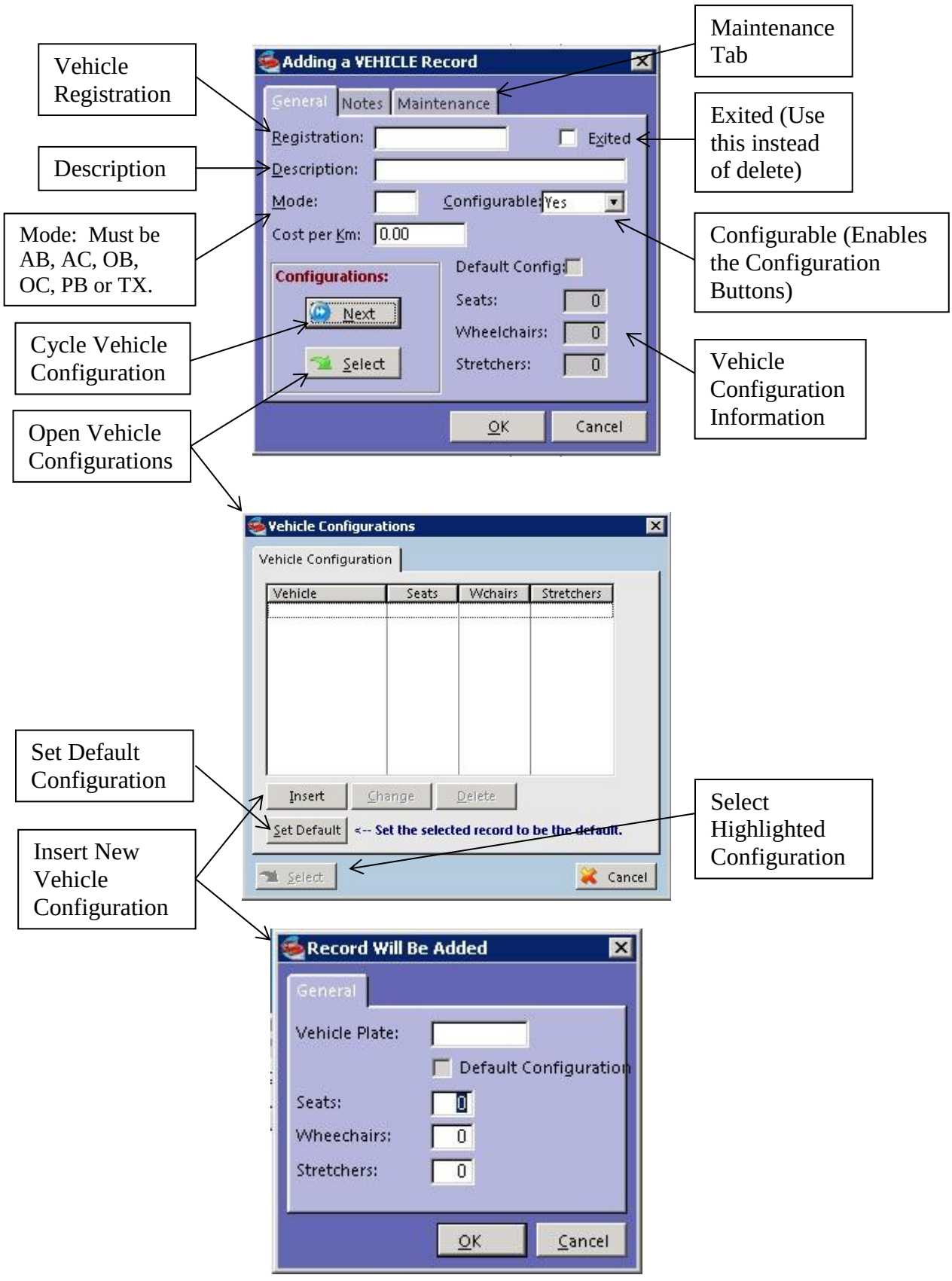
Click on **Insert** at the bottom of the page and the **Adding a Vehicle Record** will display. Enter Data for the vehicle's description.

You need to enter a **mode code** for your vehicle. The mode codes are automatically generated codes for you to select from. To access the mode codes have the cursor in the mode code field then enter a letter on your keyboard and the mode list will display. Select the appropriate mode for your vehicle then click on select. The mode code will display in your vehicle record file.

Fill-in the remaining fields, number of wheelchairs if applicable, number of seats available and if known cost per km (entering a cost per km will assist with costing a trip or budgeting for a particular vehicle cost). Repeat this procedure until all your vehicles are entered.

Ensure to enter all available information as this will assist when entering a vehicle in a New Journey.

Notice along the bottom of this entry page for vehicles '**Change**'. You may change any field if the vehicle's circumstances change or use '**Delete**' if the vehicle is no longer in use **however**, best practice would be to exit the vehicle rather than deleting it. To exit a vehicle click on the small box next to **Exited** and click on OK, the vehicle will now only appear in the exited records.



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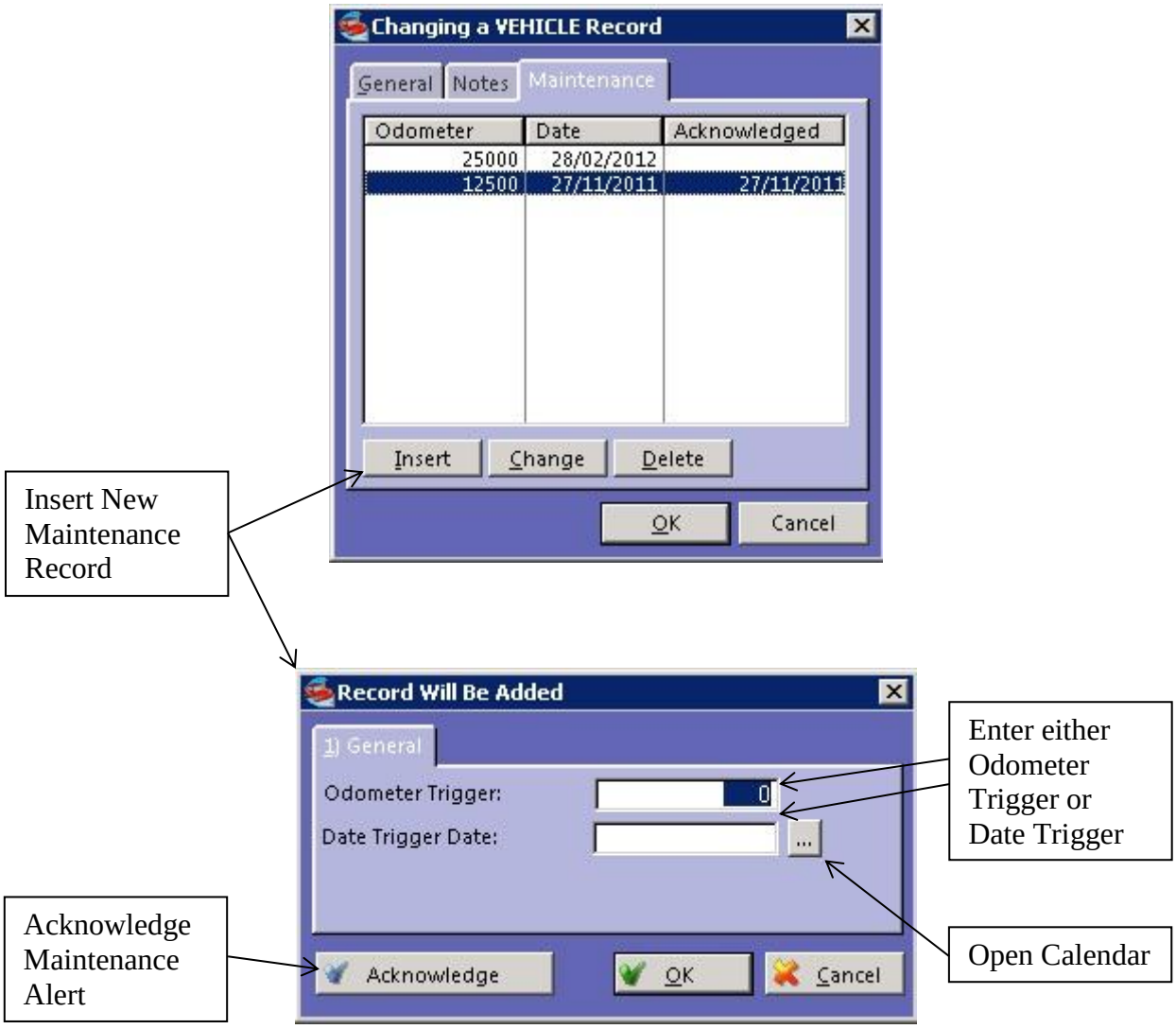
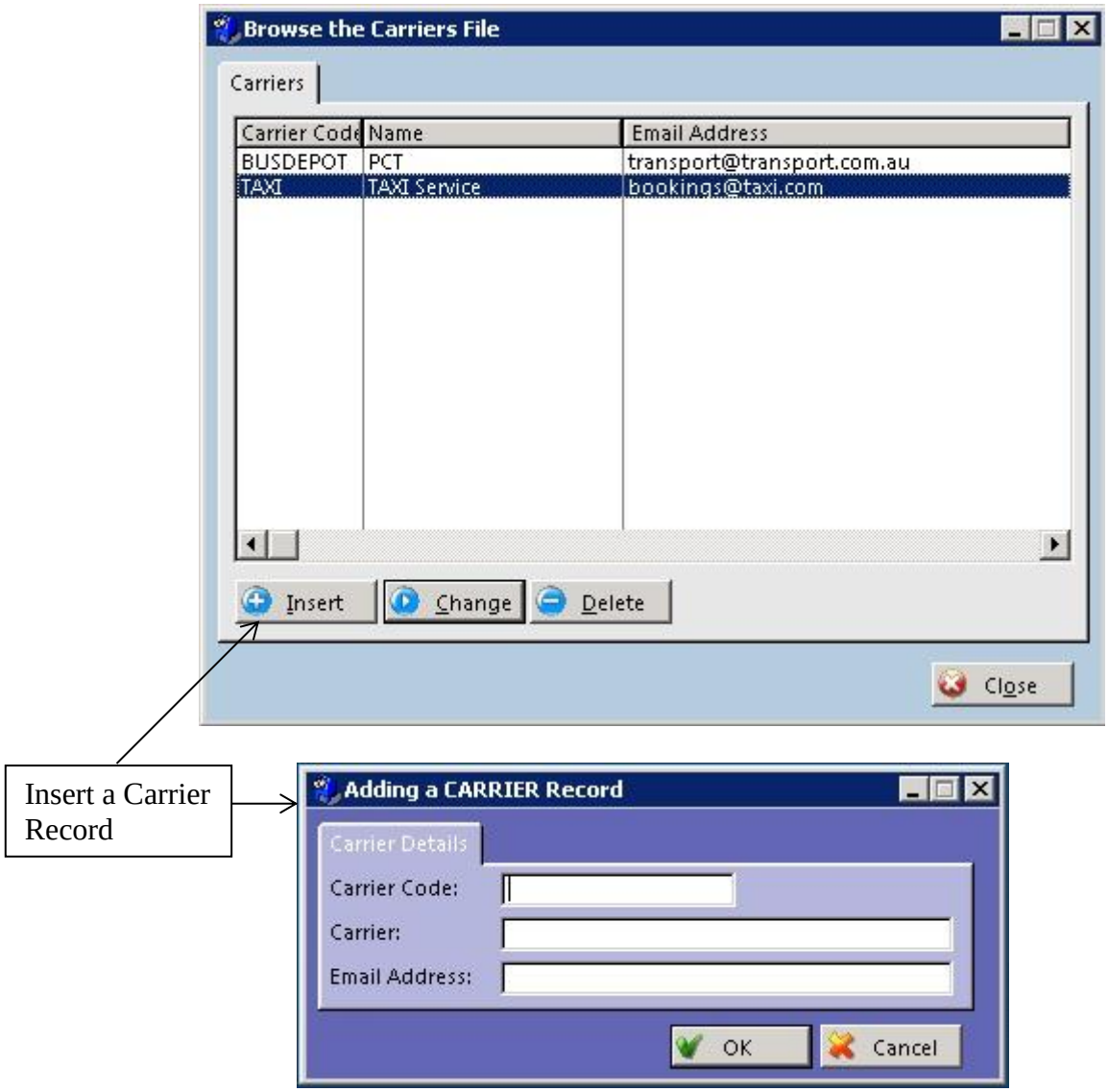

Changing a VEHICLE Record
General
Notes
Maintenance
Odometer
Date
Acknowledged
25000
28/02/2012
12500
27/11/2011
27/11/2011
Insert
Change
Delete
OK
Cancel
Insert New Maintenance Record
Record Will Be Added
1) General
Odometer Trigger:
0
Date Trigger Date:
...
Enter either Odometer Trigger or Date Trigger
Acknowledge Maintenance Alert
Acknowledge
OK
Cancel
Open Calendar

Carriers (Data Files->Carriers)

A Carrier is a business or person external to your service providing transport. This could be another transport service such as a Taxi Company or Bus Company.

This option is used by services that contract outside sources to provided transport. For example a service may not have enough vehicles or Crew Members to cope with demand. The service could outsource some of their transport needs to the local taxi company or bus company.



Client Class (Data Files->Trips CT->Client Class)

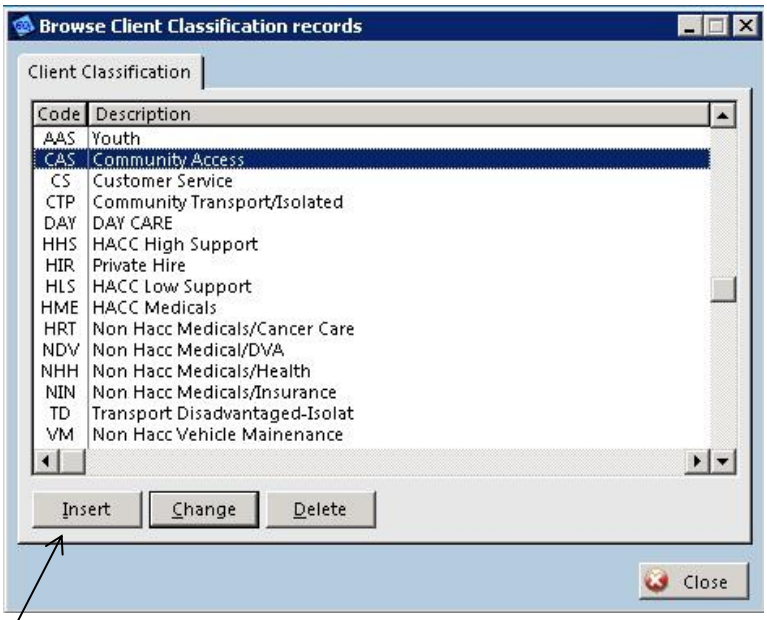
"Client Class" is short for Client Classification.

The client class identifies the client's type. For example a client maybe frail aged, transport disadvantaged, disabled, Veteran Affairs, Health Related etc.
The client class may align with the MDS concepts of Care Recipient and Carer but goes further than that. It is designed to classify your main types of passengers.

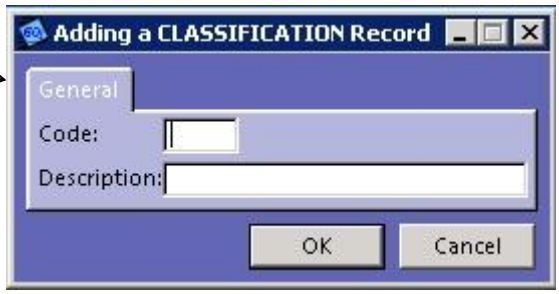
You enter the client class in the Client Record. **The client class is not recorded in TMA Central and needs to be entered in Trips Enterprise when inserting a new client.** The client class for a client can be changed at any time.

If your service requires a specific client class not listed in the Client Class Browse you can add additional client classes.

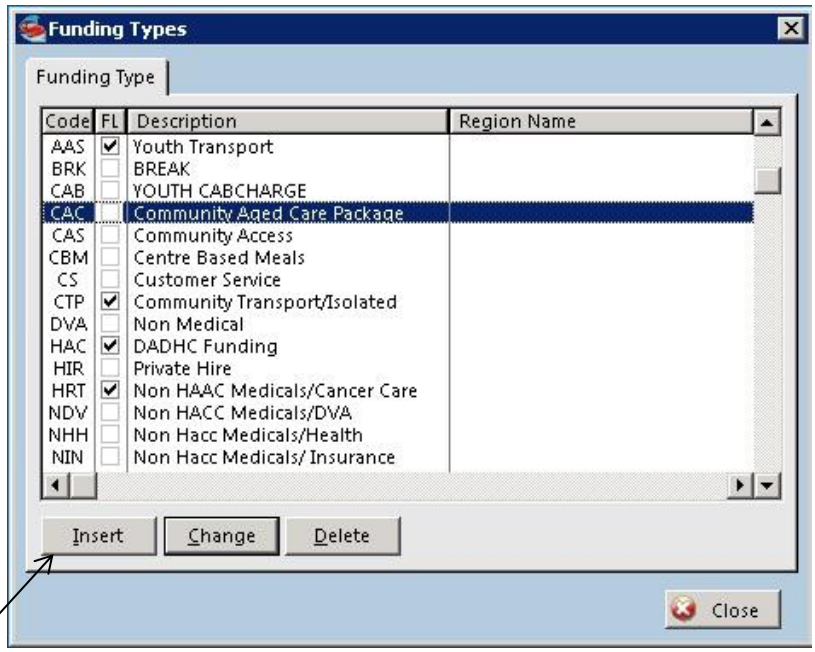
Click on **Insert** and **enter the appropriate information** in the provided fields then click on OK.



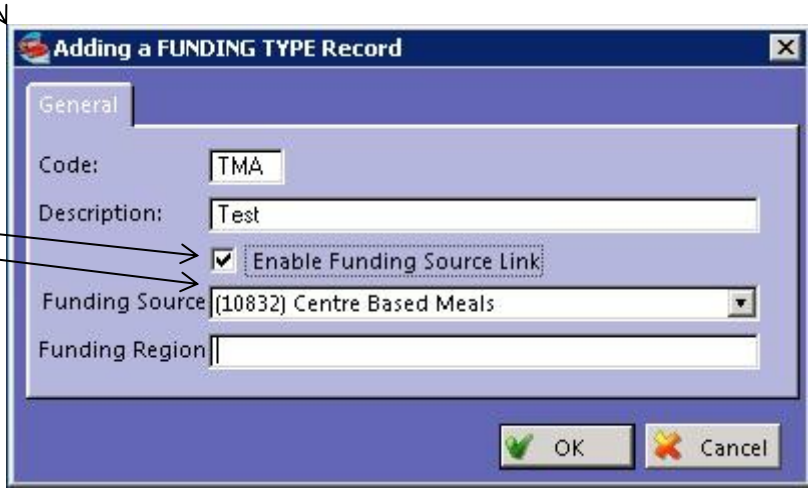
Insert a Client Classification Record



Funding Types (Data Files->Funding Types)



Insert a Funding Type Record



Enable Funding Link to TMA Central (if a Funding Type is not linked it will not be reported in the MDS)

The Funding type identifies the various funding sources the organisation uses to provide a service. Community Transport Programs are funded by Home and Community Care (HACC) and other sources of funding such Health Related Transport and Veterans Affairs.

You enter the Funding Type in the Client Record. **The Funding Type is not recorded in TMA Central and needs to be entered in Trips Enterprise when inserting a new client.** The funding type for a client can be changed at any time.

An example for use of the funding type is a where a person is on a Veteran Affairs pension and is provided transport for a medical appointment. The funding used will

come from Department of Veterans Affairs. However that same client is a frail aged person and needs transport for shopping. In this case their funding type will be HACC. Therefore, the funding type may vary with each trip. In the Client record enter the Funding Type the client is likely to use most often.

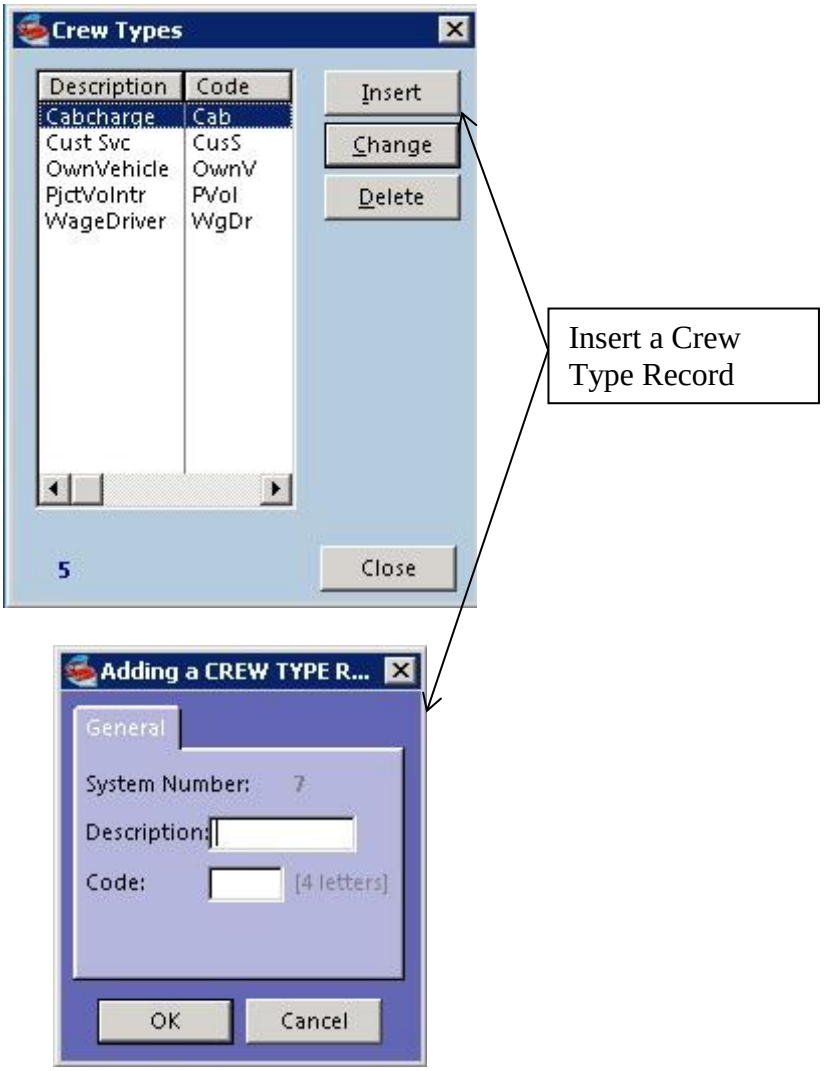
The correct data entry for Funding Types enables you to produce reports pertaining to specific funding and produce statistics for funding bodies.

To add a Funding Type Record open the Funding Type Browse and click the insert button. The tick-box “Apply HACC MDS Rules” is ticked for a Funding Type that should be reported using the Minimum Data Set (MDS).

“Apply HACC MDS Rules” should also be ticked for implementing ICTDS (Integrated Community Transport Data Set) reporting in New South Wales.

Crew Type (Data Files->Trips CT->Crew Type)

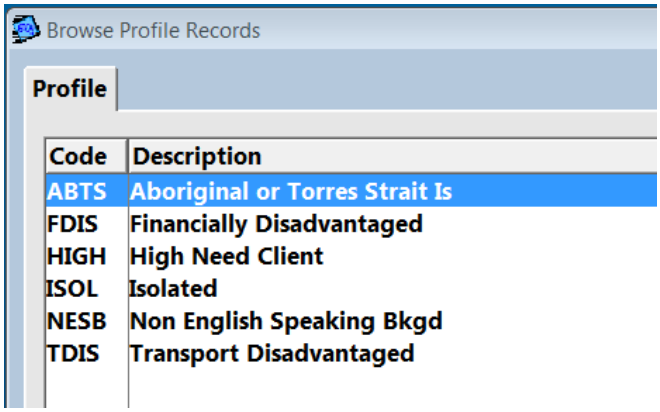
Crew Type identifies whether a Crew Member is a Volunteer, Wage Driver, Carer, and an Own Vehicle Volunteer etc. You are able to enter additional Crew Types to suit your service.



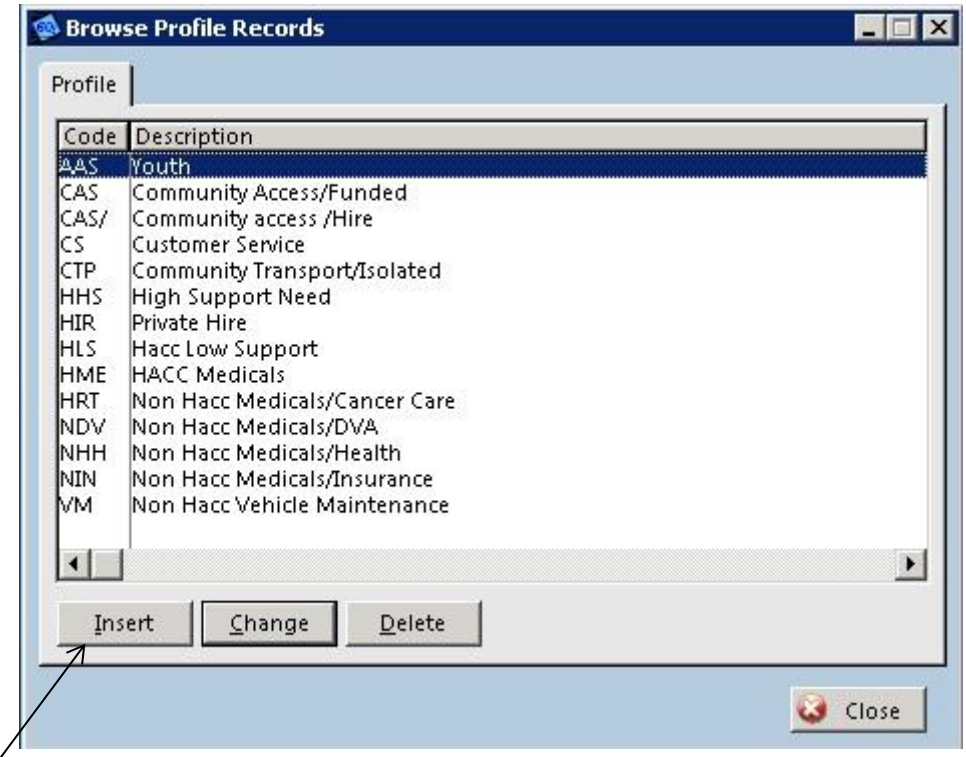
The classifications above are automatically entered into your program on installation. Whilst you are able to enter additional Crew Types it is strongly advised you do not change the three above. Driver re-imbursement reports depend on the four letter codes entered with the Crew Type description.

Profile (Data Files->Trips CT->Profile)

You can (optionally) enter the Profile into each Client's record. The Client Profile was originally used to report to HACC on high-need clients. The default choices (installed when the program is new) are:



The function of the items above has largely been replaced by the MDS. You may continue to use the choices above or delete and add items in order to modify the Profile lookup list the system for your own purposes. See example below:



Insert a Client Profile Record

TMA SOFTWARE
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Using the Profile Field for Additional Statistics

Firstly, you need to ascertain that you don't need to use the Profile field in the Clients and Trips forms for its original purpose. The original reason for this field was that HACC required statistics on the numbers of clients for the categories in the screen-shot below.

Making the Lookup List

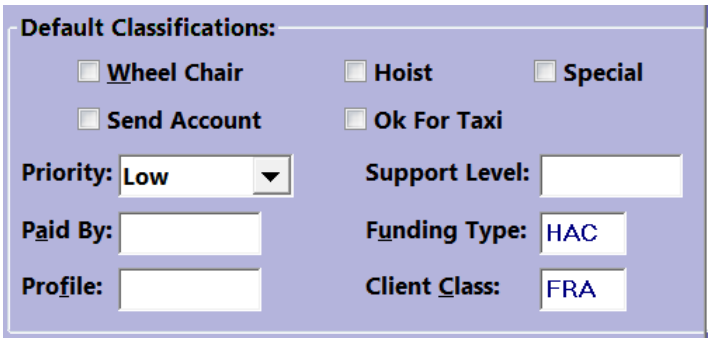
From the Main Menu: Data Files/Trips CT/Profile.
To our knowledge HACC has not requested these reports since the Minimum Data Set was implemented. Some Community Transport services are still using this list while others are using the Profile field for their own purposes.

If you decide to set up your own list then delete all the items and enter your own list. Each item can have a 4 letter code (it can be fewer letters but keep it to 4 if you can) and a description field.

It is important with statistics not to make too many or too few categories (list items). You should attempt to make a full list of categories (from your current knowledge) at the start even though additional categories may have to be added later. Having an "Other" category as a catch-all for minor quantities of items that don't fit elsewhere can be helpful but if over-used it can hide important information. It may be that you should have added a new category rather than putting a lot of items in the "Other" category.

Make sure your categories are all the same class of thing. For instance, if you are categorising colours of objects; "blue", "green", "yellow", you don't suddenly add "square" or "round" otherwise your list categorisation will lose its meaning.

Profile Field in the Client Form



The profile field is at the bottom left of the Default Classifications section of the Client record.
Default classifications fields are the expected classifications for a Client. They are copied from the Client records when you look up a client when entering a Trips record.

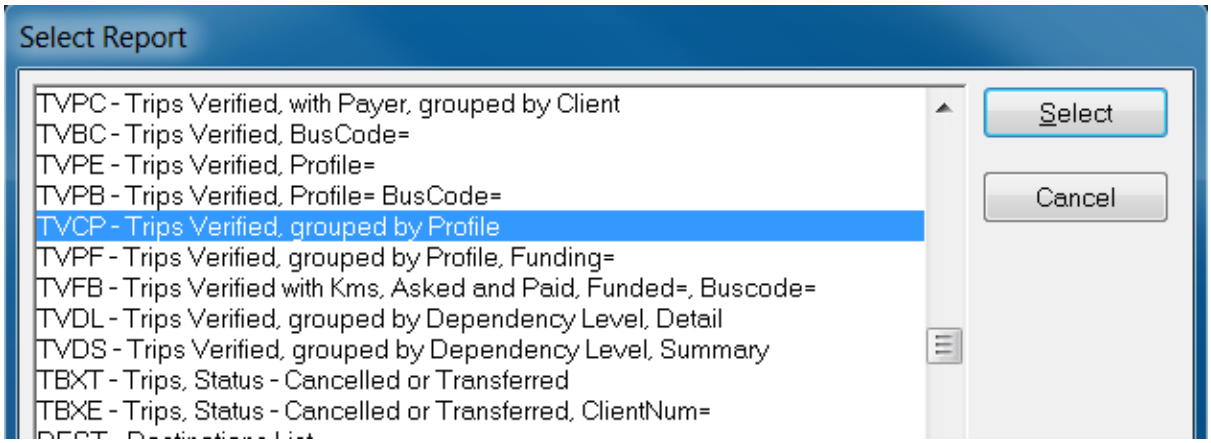
The entry in a default classification field should be changed before Verification if the value in it is not correct for this trip. It can be changed afterwards if you forget to do it before verification.

The Profile Field in the Trips Record

The profile field is near the top right of the Trips form.
In order to provide accurate statistics you need your staff to consistently fill in the Profile field for every new Client record and check it for every Trips record that gets verified. There is no automatic reminder.

Reporting

In Trips Main Menu select Reports, then select the “Bus Jny Trips” library.
The Profile reports are TVPE, TVPB, TVCP and TVPF. Find out which is best for you.

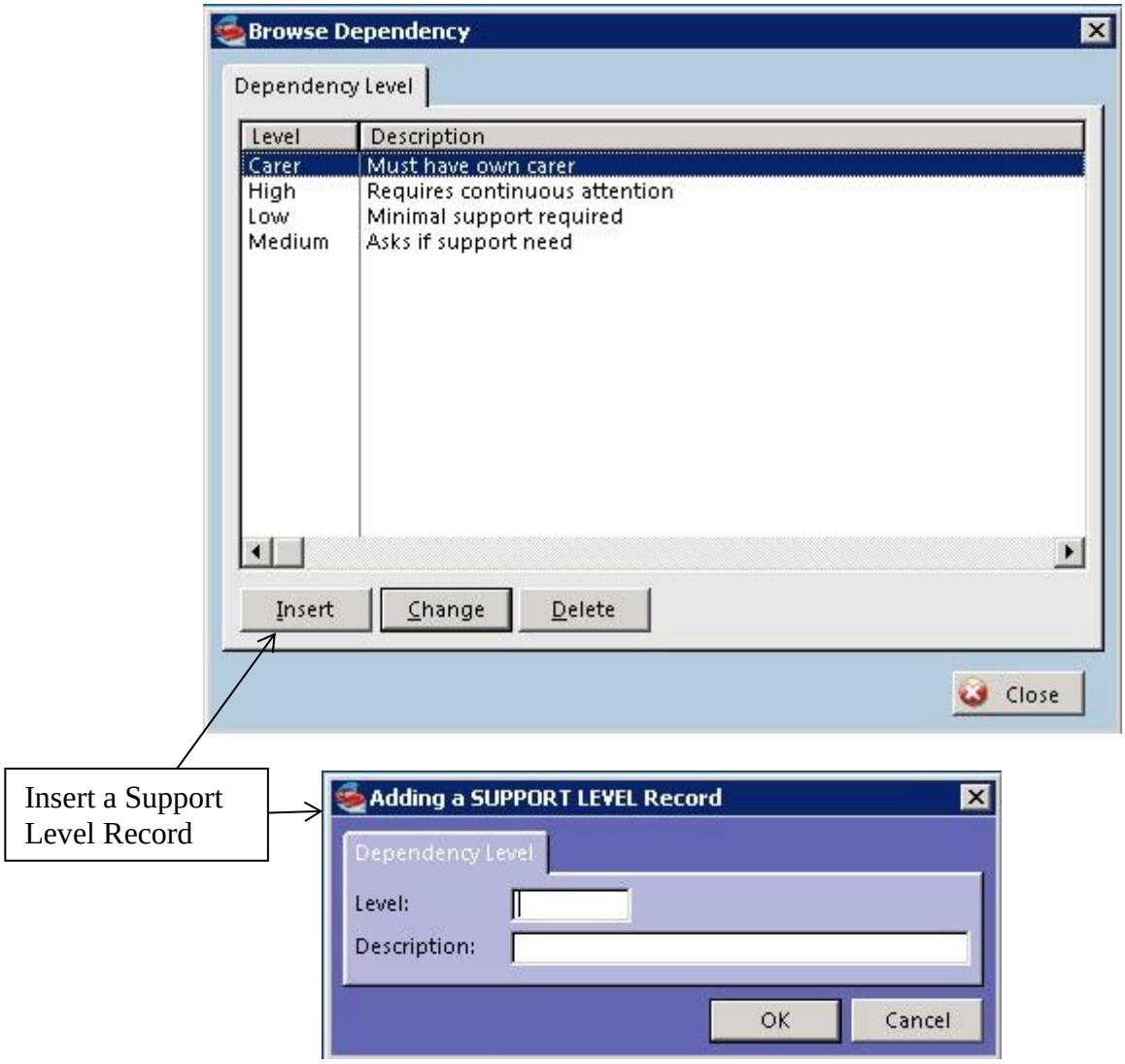

Select Report
TVPC - Trips Verified, with Payer, grouped by Client
TVBC - Trips Verified, BusCode=
TVPE - Trips Verified, Profile=
TVPB - Trips Verified, Profile= BusCode=
TVCP - Trips Verified, grouped by Profile
TVPF - Trips Verified, grouped by Profile, Funding=
TVFB - Trips Verified with Kms, Asked and Paid, Funded=, Buscode=
TVDL - Trips Verified, grouped by Dependency Level, Detail
TVDS - Trips Verified, grouped by Dependency Level, Summary
TBXT - Trips, Status - Cancelled or Transferred
TBXE - Trips, Status - Cancelled or Transferred, ClientNum=
Select
Cancel

Support Level (Data Files->Trips CT->Support Level)

Support Level is another method of categorising clients. Enter into a client record (after importing the client from TMA Central). You are able to change the support level, as the client's needs change.

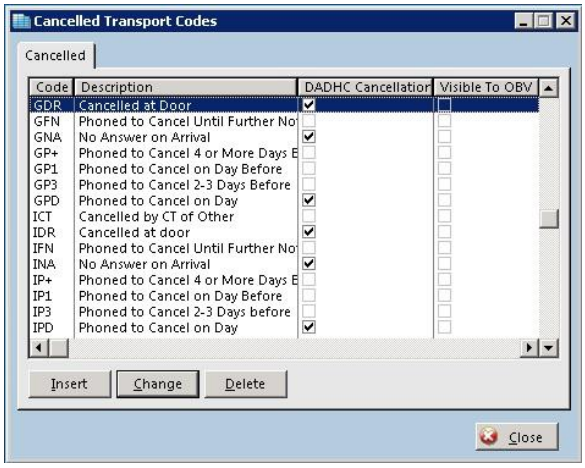
The support level will assist the service in identifying a client's needs when organising transport. You may enter new support levels as needed. Don't delete a support level if it has already been used in client records.

To insert an additional Support Level click insert and enter appropriate information then click OK, the new Support Level will now be display in the list.



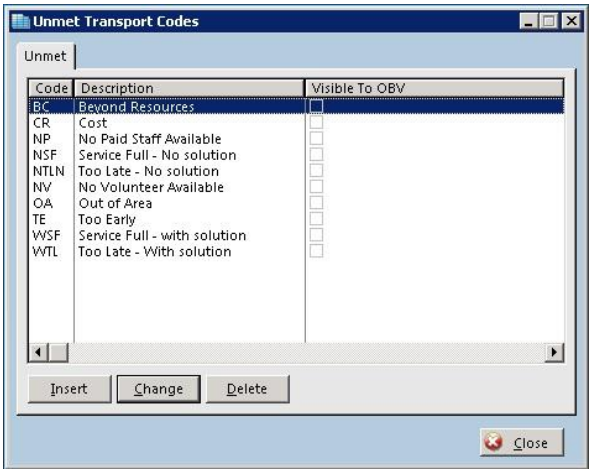
Unmet Cancelled (Data Files->Unmet Cancelled->Cancelled or Unmet Codes)

You are able to enter these codes against a client in the New Journey page or when verifying. Entering these codes will provide a service with reports of the number of cancellations or unmet need thus identifying problems, issues or statistics to support additional funding.


Cancelled Transport Codes
Cancelled
Code
Description
DADHC Cancellation
Visible To OBV
GDR Cancelled at Door
GFN Phoned to Cancel Until Further No
GNA No Answer on Arrival
GP+ Phoned to Cancel 4 or More Days E
GP1 Phoned to Cancel on Day Before
GP3 Phoned to Cancel 2-3 Days Before
GPD Phoned to Cancel on Day
ICT Cancelled by CT of Other
IDR Cancelled at door
IFN Phoned to Cancel Until Further No
INA No Answer on Arrival
IP+ Phoned to Cancel 4 or More Days E
IP1 Phoned to Cancel on Day Before
IP3 Phoned to Cancel 2-3 Days before
IPD Phoned to Cancel on Day
Insert
Change
Delete
Close

The **Cancellation Codes** List provides information as to when a client has made the cancellation or has been a no show. You will also be able to identify clients who cancel regularly or do not notify the service when transport is not required. We recommend not entering additional codes even though you can. When those cancellations (ticked in the picture above) are entered in the Trips record these statistics will be included in the NSW MDS. Cancellations can impact heavily on a services statistics.

See the Cancellation Code Browse displayed below. To access these codes select Data Files than click on Cancellation Codes.

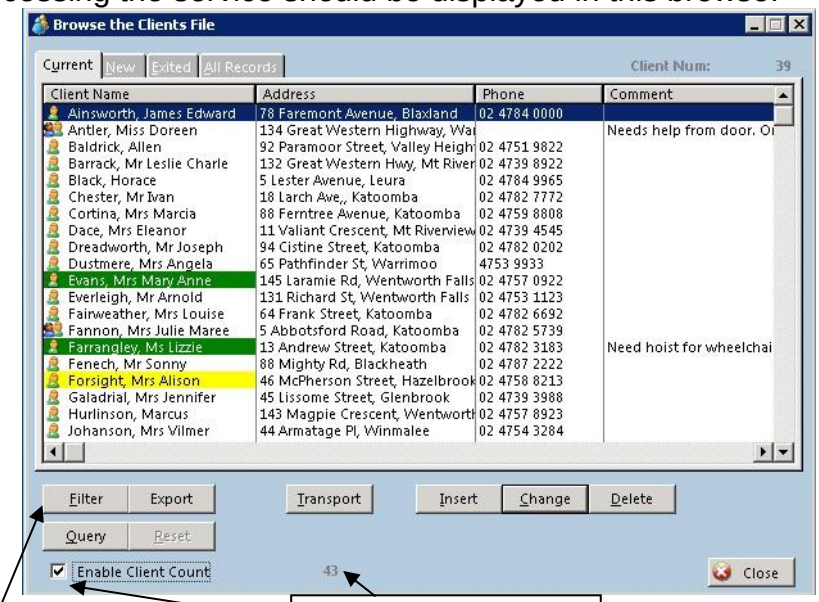


The **Unmet Codes** List provides information when the service has been unable to provide transport. Inserting this information allows you to provide statistics to DADHC for the Unmet Need in your service. It is recommended you don't change the Unmet codes in case Unmet statistics are required state-wide.

Client Browse (Data Files->Client Browse)

The Client Browse window offers three ways at looking at the client list. Firstly you have a list of the **Current Clients**, the second button along allows you to access the **Exited clients** and the third button along allows **All Clients** (includes Current and Exited) to be displayed.

All Clients accessing the service should be displayed in this browse.



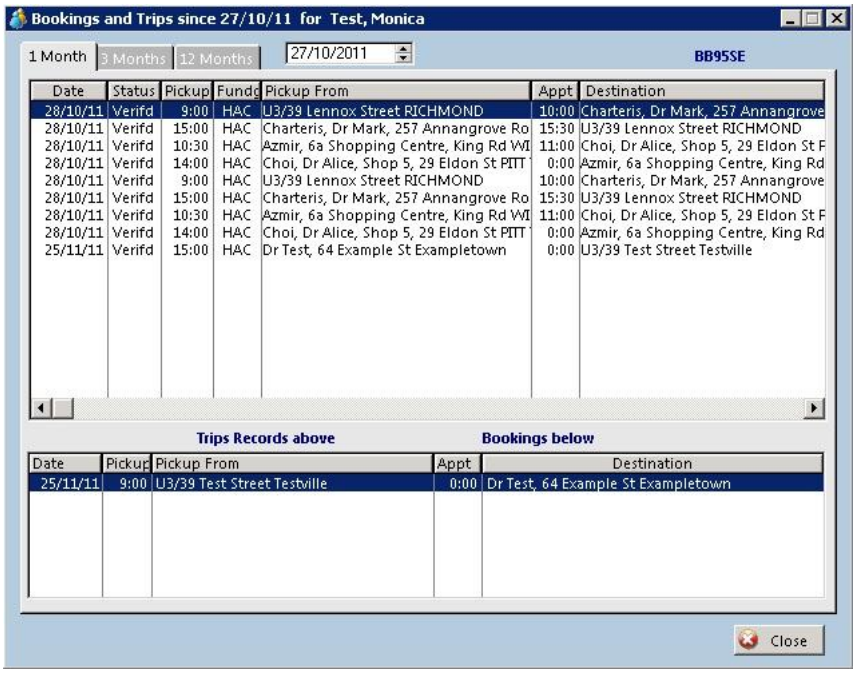
You will notice that some of the Clients appear in red. The reason for this is the clients have been transferred from TMA Central and need to have additional information entered against them such as their funding code, client class and who is paying for the service. The information you enter for a client is vital to the operation of Trips. When you open a red Client record, modify it and click “OK” it will change from red to black. So make sure you enter all the data you need to before losing this important colour flag.

Filter option: The filter option assists in identifying a client with limited information. Such as if you have a client’s phone number but do not know who the client is, you simply click on the filter button enter the phone number in the filter field and providing the client’s phone number had been previously entered the client will appear on the filter list.

You can also use the filter when checking errors or rejections on the MDS send report. Simply enter the MDS Letters of Name from the MDS report in the filter option and the client who had the error or rejection against them will be found in the filter list.

Transport button: The Transport button allows you to quickly look at transport or bookings a client has made or received in a one month, three month or twelve month period. You can also enter an alternate “date from” if you wish.

You simply highlight the appropriate client then click on the Transport button. A list will display with three buttons along the time for one, three or twelve months. You simply click on the required button and the client’s transport they have received will be displayed.

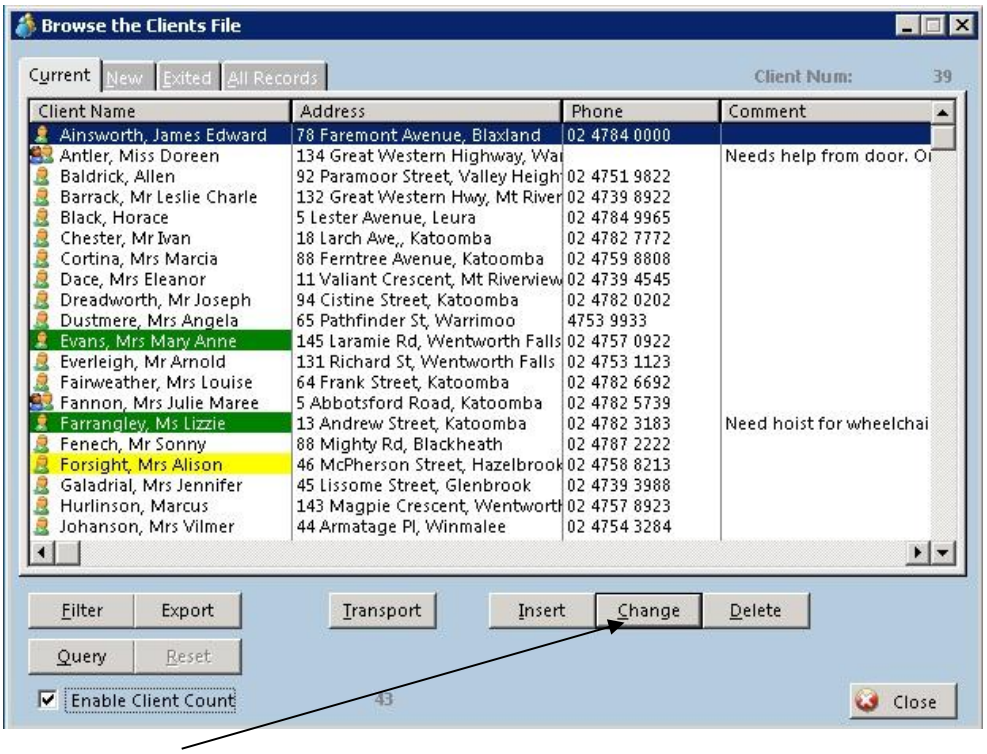

Bookings and Trips since 27/10/11 for Test, Monica
1 Month
3 Months
12 Months
27/10/2011
BB95SE
Date Status Pickup Fundg Pickup From Appt Destination
28/10/11 Verifd 9:00 HAC U3/39 Lennox Street RICHMOND 10:00 Charteris, Dr Mark, 257 Annangrove
28/10/11 Verifd 15:00 HAC Charteris, Dr Mark, 257 Annangrove Ro 15:30 U3/39 Lennox Street RICHMOND
28/10/11 Verifd 10:30 HAC Azmir, 6a Shopping Centre, King Rd WI 11:00 Choi, Dr Alice, Shop 5, 29 Eldon St F
28/10/11 Verifd 14:00 HAC Choi, Dr Alice, Shop 5, 29 Eldon St PITT 0:00 Azmir, 6a Shopping Centre, King Rd
28/10/11 Verifd 9:00 HAC U3/39 Lennox Street RICHMOND 10:00 Charteris, Dr Mark, 257 Annangrove
28/10/11 Verifd 15:00 HAC Charteris, Dr Mark, 257 Annangrove Ro 15:30 U3/39 Lennox Street RICHMOND
28/10/11 Verifd 10:30 HAC Azmir, 6a Shopping Centre, King Rd WI 11:00 Choi, Dr Alice, Shop 5, 29 Eldon St F
28/10/11 Verifd 14:00 HAC Choi, Dr Alice, Shop 5, 29 Eldon St PITT 0:00 Azmir, 6a Shopping Centre, King Rd
25/11/11 Verifd 15:00 HAC Dr Test, 64 Example St Exampletown 0:00 U3/39 Test Street Testville
Trips Records above
Bookings below
Date Pickup Pickup From Appt Destination
25/11/11 9:00 U3/39 Test Street Testville 0:00 Dr Test, 64 Example St Exampletown
Close

At the bottom of the screen it shows a list of current bookings (if any).

THE PROGRAM DOES NOT ALLOW A CLIENT TO BE DELETED.

To remove a client from the current list, open the client record, click on the "Extra" tab and fill in the "Exit Date" field. On pressing OK the client will be transferred to the "Exited" list. To restore a client to the "Current" list, simply remove the exit date.

THE PROGRAM WILL NOT ALLOW YOU TO ENTER A NEW CLIENT.
All new clients need to be entered into TMA Central then transferred to the Client Browse in Trips Enterprise by clicking on *Client Update* on the Trips Enterprise menu.

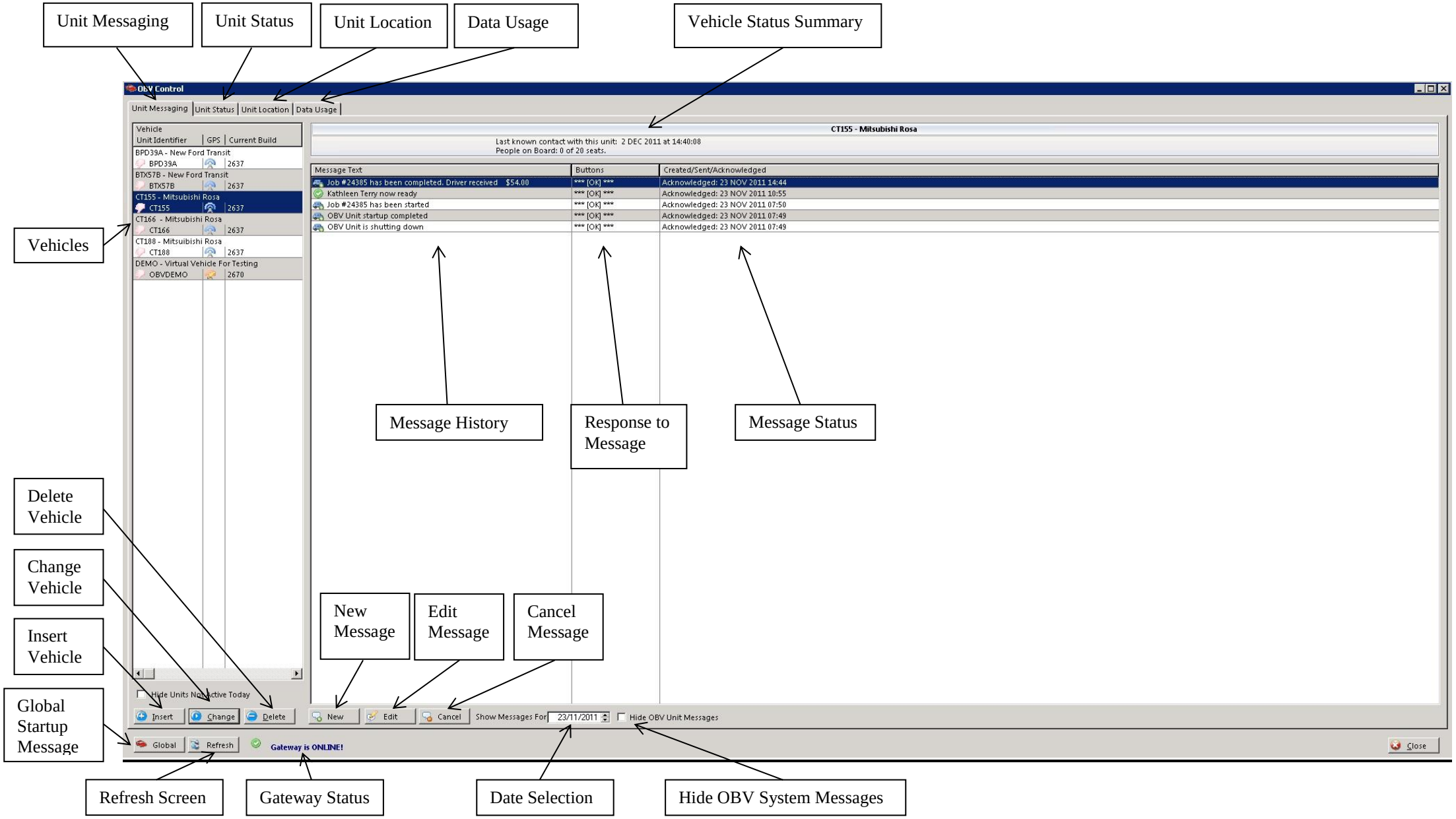


To edit a client's record (whether old or new) highlight the record and click on the change button. Alternately double-click on the record.

A CLIENT CANNOT BE ENTERED FOR A TRIP IN NEW JOURNEYS UNLESS THEY ARE IN THE CURRENT LIST.

OBV Control (Data Files->OBV Control)

The OBV Control screen allows you to access all of the OBV features of Trips Enterprise; including adding or removing vehicles, unit status, sending messages and viewing the unit location. Trips OBV acts as an electronic run sheet for the driver, all the information collected including pickup and drop off times, kilometres, and money collected will automatically be recorded in the Journey and Trips records in Trips Enterprise. This eliminates the need to type all of the information from a handwritten run sheet into Trips Enterprise.



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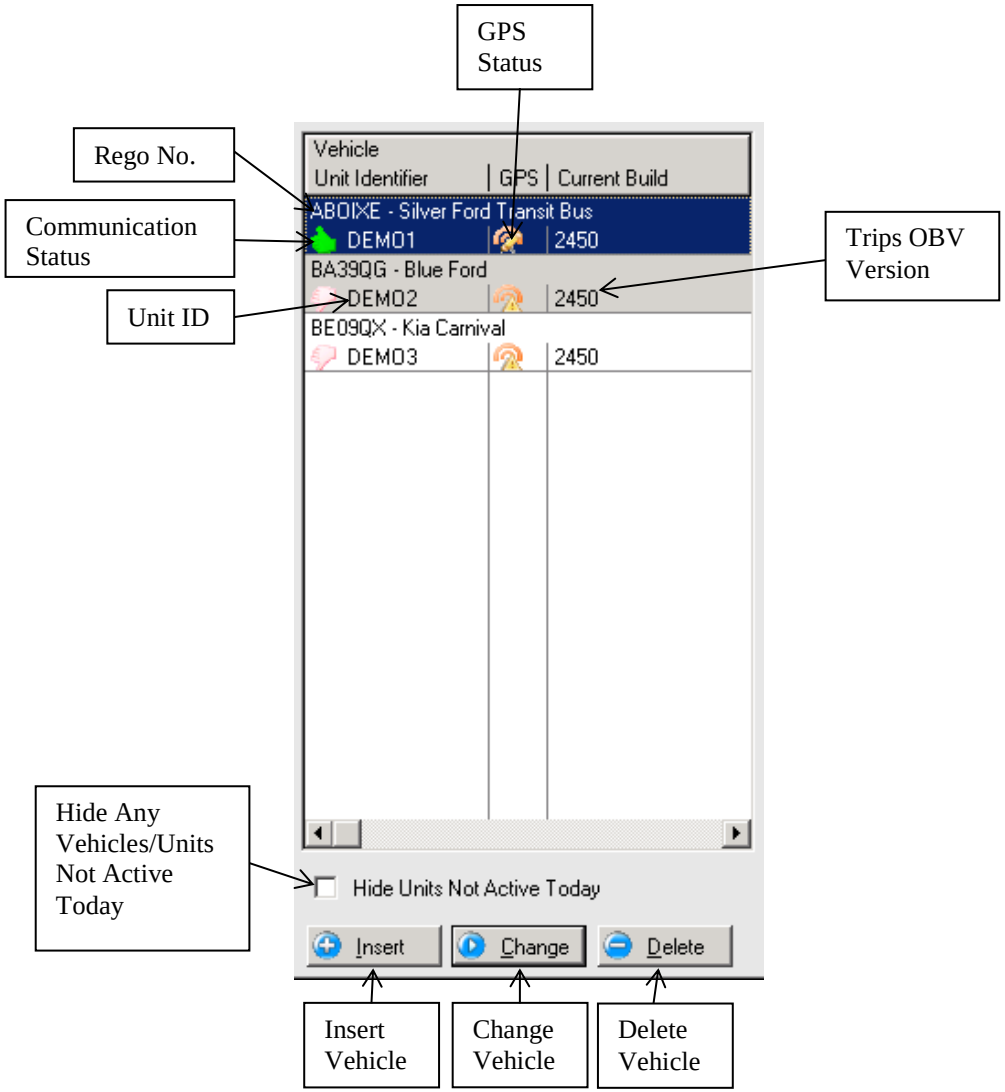
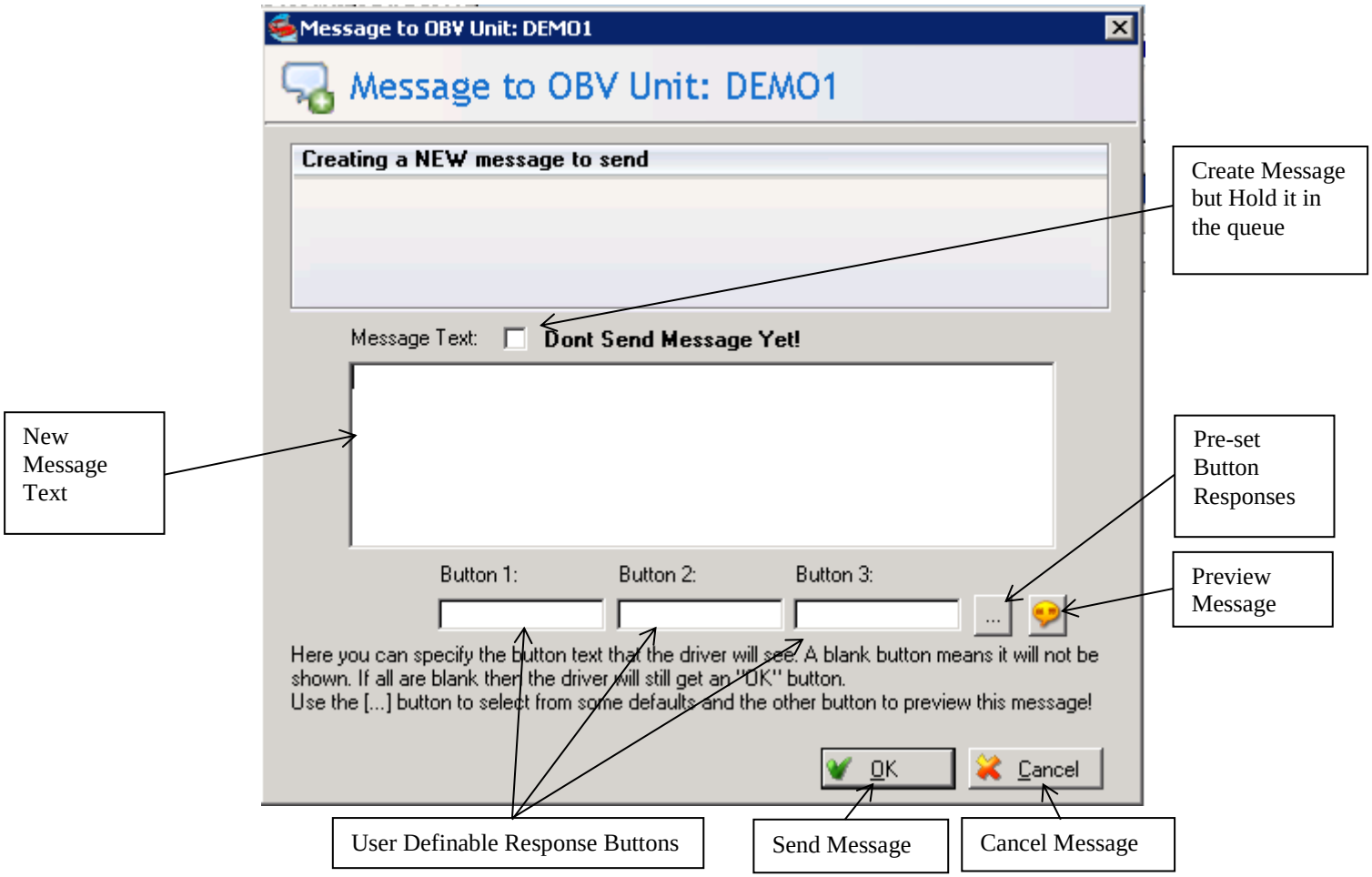

GPS Status
Rego No.
Communication Status
Unit ID
Trips OBV Version
Vehicle
Unit Identifier
GPS
Current Build
ABOIXE - Silver Ford Transit Bus
DEMO1
2450
BA39QG - Blue Ford
DEMO2
2450
BE09QX - Kia Carnival
DEMO3
2450
Hide Any Vehicles/Units Not Active Today
Hide Units Not Active Today
Insert
Change
Delete
Insert Vehicle
Change Vehicle
Delete Vehicle

New Message


Message to OBV Unit: DEMO1
Message to OBV Unit: DEMO1
Creating a NEW message to send
Message Text:
Dont Send Message Yet!
Button 1:
Button 2:
Button 3:
...
Here you can specify the button text that the driver will see. A blank button means it will not be shown. If all are blank then the driver will still get an "OK" button.
Use the [...] button to select from some defaults and the other button to preview this message!
OK
Cancel
Create Message but Hold it in the queue
New Message Text
Pre-set Button Responses
Preview Message
User Definable Response Buttons
Send Message
Cancel Message

Query Button

Queries are a way of extracting useful information from a database.

The Query button appears in the bottom left of Client Browse, Journey Browse and Trips Browse pages as well as in Transport -> Data Analysis -> Trips Query. The Query selection is a valuable tool when you have a good understanding of the clients table and how the Query Wizard works.

The Query selection can be at first difficult to use and understand. However the benefits to using it will prove to be invaluable to your service. This guide will offer a small explanation of the use when explaining the Query button on the Client Browse page. A more detailed explanation will follow.

The Query option is similar to asking the program a question with limited information. Computer programs use languages that we, as humans do not ordinarily use in our daily lives. The Query Wizard interpreter allows questions to be asked in a language that both the user and the database will understand.

Each Query may consist of one or more questions, logically connected with “AND or and OR logical operator”. In order to complete a valid “computer” question Query Wizard must collect three components of information: **Field, Operator** and **Value**. Given these three components, Query Wizard will construct a meaningful question.

Field

The Field is generally representative of information contained within the database for which the **developer has made available**. The field is therefore considered the subject of the question or what you would like to learn about. A few examples of fields would be Account Balance, Last Name or Post Code.

Operator

The Operator represents the comparison to be made between the Field and Value. Due to the nature of the value, operator selections for numbers are limited when compared to those for text. For example the most common numeric operators are Greater Than, Less Than or Equal To. The nature of text operators allow for such comparisons as Contains and Begins With. The **Operation Selection** guide discusses these issues in greater detail.

Value

The Value will be compared (via the operator) to the field in your database. The value entry is the way you wish to describe the subject (field) of the question. In essence the value describes the trait the field should have (or not have). Query Wizard offers **many useful features** to assist the user with their value consideration.

Query Wizard Steps

1. Open the Client Browse and ensure it is set on the "Current" tab.

2. Press the Query button

3. Check the list of queries to see if you have created and saved a query for your current requirement beforehand.

4. Press the "New" button.

5. Find the field you want to check on. (Let's say you want to display all clients who have "Wheelchair" ticked in the Client form - so press "w" to find the first field in the client form that begins with "w". It happens to be "Wheelchair". That is the field you want so click the "Next" button.

6. Up pops a list of Query Operations. These allow you do all kinds of computations including selecting by date range, selecting by age or age range, selecting all the clients who live in a suburb, etc, etc. In this case you just want to list the clients where "Wheelchair" is ticked. So select "Is Equal To" and click "Next".

7. It now asks for a value entry. In computers, where you have a yes/no or a true/false it is generally internally represented as 1 for True and 0 for False. You want to get a list of clients where Wheelchair is True, so enter a "1" (don't enter the quotes and press the "Next" button).

8. You now see the whole computation. At this point you could add an additional computation, e.g. you might want to limit the list to male wheelchair clients only

In which case you would add another computation: sSex = 'Male'
Note. the small "s" infront of a field name means it is a string of letters:
e.g. sSex = "Male" will give the same result as Sex = 1
e.g. sSex = "Female" will give the same result as Sex = 2

To get full information on the numbers used in fields you need to read the HACC User Guide

Anyway, back to the query at hand; Wheelchair = 1 . That is all we need for this query so click on the "Finish" button.

9. You are asked if you want to save the query. It is usually best to save it because if it isn't quite right you can always open it and fix it up and you can also run it again later.

10. It asks for a query description. Make it as clear as possible. e.g "Wheelchar Clients". Click "OK".

11. The Client Browse returns but now it lists only wheelchair clients or more correctly "client records that have the wheelchair checkbox ticked". It can only go on the data in the clients table.

12. If you just wanted a count of wheelchair clients then you tick "Enable Client Count" on the bottom-left of the Client Browse.

13. If you want to print a list of clients select the Export button.
    a) Using the Windows "Save As" windows select where you want to save the file
    b) Give the file a suitable name, e.g. "Wheelchair Clients.csv"
    c) Set "Save as type" to "All Files" and press the "Save" button

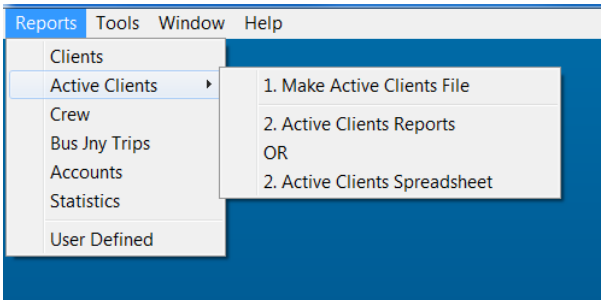
14. Locate the file (in the folder where you saved it) and open it (in Excel).

15. Delete the columns you don't need to print out

16. Make Totals for quantity columns if you need them

17. Print the file

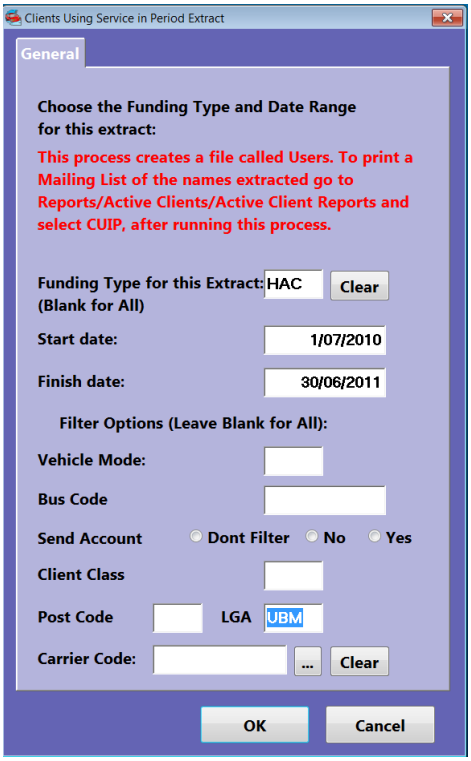
Active Client Reporting



Trips Enterprise the Active Client feature has been modified so that, as well as printing a report of active clients, you can create and save the result as a CSV file spreadsheet. You can then open the CSV file using Microsoft Excel.

Once you have done "1. Make Active Clients File" then you can then do "2. Active Clients Reports" or "2. Active Clients Spreadsheet" or both. The list of clients created by step 1 remains until you (or another person on the network) re-runs step 1 or until Trips is closed.

The beauty of this is that you have two levels of "drill down" to get the data you want. Once you have set the parameters* and produced your Active Client spreadsheet you can use Excel to further refine the data. You can be a data-mining expert!
The spread-sheet is in the same format as is used in the Simple Export spreadsheet (Tools/Export Data to CSV/Simple Export). It saves into your Export directory as "ActiveClients.csv". It may be displayed as "ActiveClients" without the "csv".
Whereas the Simple Export list includes all clients in Trips, the Active Clients Spread sheet includes only clients according to the parameters you set. You must always set a date range but other than that you may include a value in (or leave blank) any or all of the other fields.



New: The Active Client feature now includes LGA as one of the parameters that can be used to limit the resulting list of clients, thus you can create statistics of your transport activity by making a report or spread sheet for each Local Government Area.

Note: If you enter a value in *any of the parameters* that doesn't match any Trips records (within the date range you have set) then you will end up with an empty report or spread-sheet. For example if you haven't added LGA codes to suburbs in the Locations table then you put a value in the LGA field you will get zero records in the Active Clients report or spread sheet.

CTO Reports

"CTO Reports" is an add-on program that goes with Trips Enterprise.

The reports "CTO Reports" produces are excellent summaries of your verified transport activity. They are valuable not just for Community Transport Organisation members reporting to CTO, but also for reporting to your committee, council or other auspicing body and for comparing productivity over the years. To get the same data otherwise requires you to run a number of reports and then summarise the results into a spread-sheet.

CTO Reports – Tips and Techniques.

1. You don't have "CTO Reports"? Because it is a separate program it requires a separate shortcut to run it. If you don't have a shortcut then you need to make one or get it made for you.

   The program **CTOReport.exe** is in the same folder as "Trips Enterprise". You can set up the shortcut with the following steps:
   a) Right-mouse-click on the Trips Shortcut
   b) Left-mouse-click on Properties
   c) Write down the path in the line labelled "Start in", then click on "OK" to close the shortcut
   d) Use Windows Explorer to find your way to that folder, then find **CTOReport.exe** (it may display as **CTOReport)**
   e) Right-mouse-click on it, left -mouse-click on "Send to" then left -mouse-click "Desktop".

   ** If the above procedure is too hard to follow then get your IT person to set it up or call TMA Software.

2. To run CTO Reports you select "CTO Report" from the menu. Two steps are displayed: **Step 1. Extract** and **Step 2. CTO Reports.**

3. Statistical reporting is generally done by quarter. You would **Step 1. Extract** the quarter by entering the start and end dates of the quarter in the date form and pressing OK. Other date ranges can be used, for instance you might want a single report for a whole year.

   Note: If you wanted to do quarterly reports for a whole year then you only need to do one extract for the whole year. You can then do the four quarterly reports based on that single extraction. The extracted data remains on file until a new **Step 1. Extract** is done, even if you close CTO Reports and/or Trips.

4. Select **Step 2. CTO Reports.** You see a choice list of two reports. "Passenger Trips by Mode of Travel" and "Passenger Trips by Service Type". Each of these reports will only count verified trips.

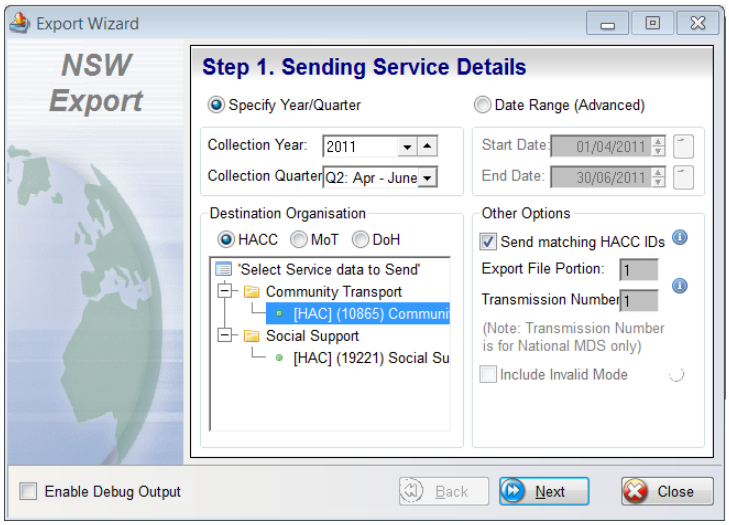
If you are not already using these reports please try them. They produce a very concise and attractive presentation of you service's activity.

If you have difficulties with this then please get your IT person to do it or contact TMA Software.

How to Send the MDS

1. Transfer the data from your **Service Program** or programs (Trips Enterprise, Caremaster etc.).

2. In "TMA Central" click on the "Funding Export" button on the toolbar. The "Export Wizard – Step 1" will appear:



Note: If the toolbar under the menu line isn't visible on the opening screen of "TMA Central", it is because you are running a screen resolution of 800x600. In this case select Tools/MDS Export from the main menu.

3. The wizard will probably have selected the correct year and quarter for you. If not, manually change the Collection Year and/or Collection Quarter.

4. Ensure "HAC" is selected in the "Destination Organisation" box.

Note: Some services have more than one HACC funding contract. These should have been entered in TMA Central's "Settings" window with their appropriate contract numbers. Other services have more than one TMA program that record MDS data for the same HACC contract number. The HACC Contract number is also called the "HACC MDS ID".

5. If you have more than one HACC funding contract then select the one for which you wish to send the MDS at this time.

6. If you have several TMA programs that record MDS data for the same HACC MDS ID, select one of the "Destination Organisations" with that HACC MDS ID, then tick the checkbox "Send matching HACC ID's" on the right. This will include all of the TMA Programs with that HACC MDS ID in the one Transmission.

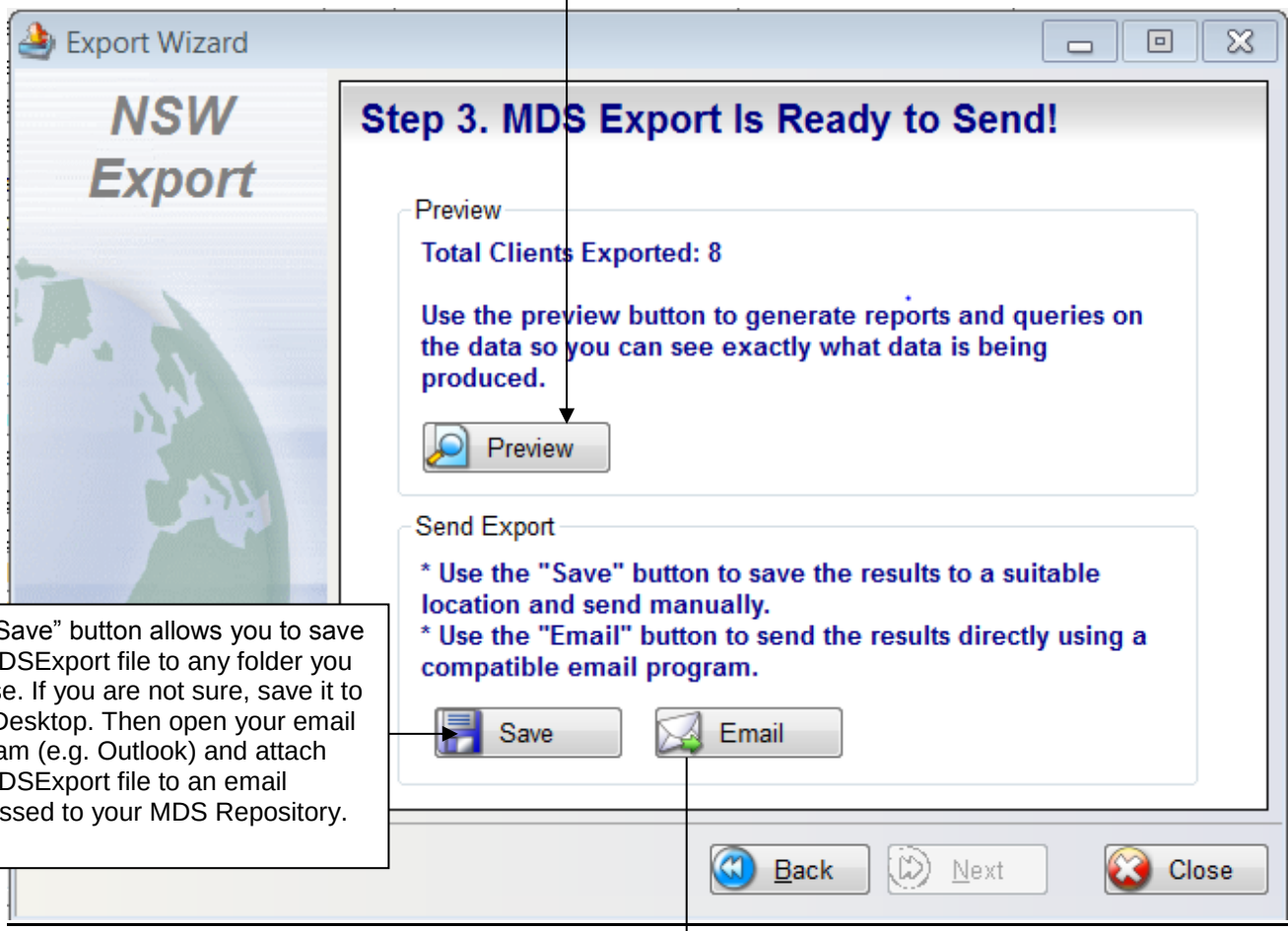
Note: If you wish to send separate MDS transmissions for services that share a HACC MDS ID then you will have to ensure you give each transmission a unique File Portion Number. If you don't provide unique File Portion Numbers then later transmissions sent will overwrite (delete and replace) previous transmissions for that HACC MDS ID. See "Other Options" in the picture above.

7. Click the "Next" button. The "Step 2 Processing" page of the wizard (not shown here) is just for your information. Click "Next" again.

Note: You may close the wizard at any stage without losing client MDS information.

8. When the processing is complete this window appears.

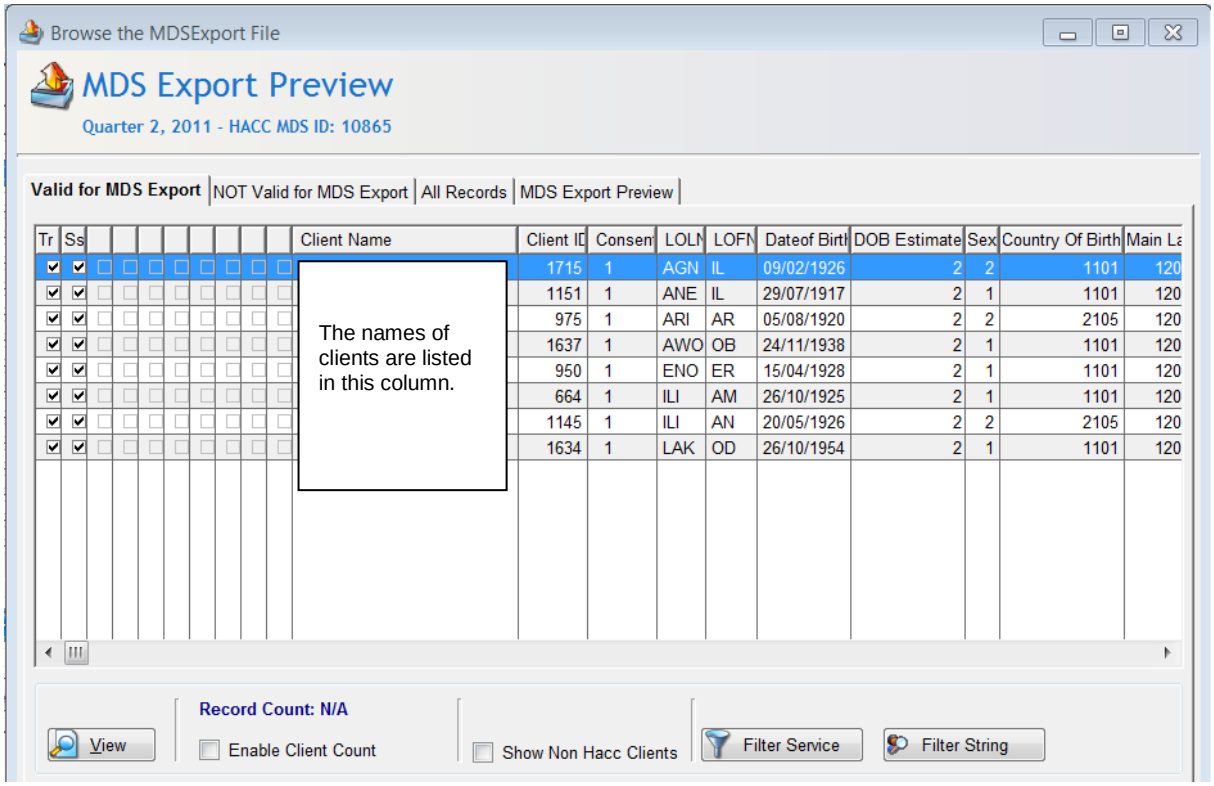
The preview button allows you to see a list of the client's records that are valid for MDS export and another list showing client's records that are not validated for MDS export. (See next section)


Export Wizard
NSW Export
Step 3. MDS Export Is Ready to Send!
Preview
Total Clients Exported: 8
Use the preview button to generate reports and queries on the data so you can see exactly what data is being produced.
Preview
Send Export
* Use the "Save" button to save the results to a suitable location and send manually.
* Use the "Email" button to send the results directly using a compatible email program.
Save
Email
Back
Next
Close

The "Save" button allows you to save the MDSExport file to any folder you choose. If you are not sure, save it to your Desktop. Then open your email program (e.g. Outlook) and attach the MDSExport file to an email addressed to your MDS Repository.

The "Email" button allows you to email the MDSExport directly to the MDS repository.
Note: TMA Central will only do this if your email details have been set up in Control settings and the IT people for your organisation allow it and set it up for you.

The Preview Screen


Browse the MDSExport File
MDS Export Preview
Quarter 2, 2011 - HACC MDS ID: 10865
Valid for MDS Export
NOT Valid for MDS Export
All Records
MDS Export Preview
Tr
Ss
Client Name
Client ID
Consent
LOLN
LOFN
Dateof Birth
DOB Estimate
Sex
Country Of Birth
Main La
1715 1 AGN IL 09/02/1926 2 2 1101 120
1151 1 ANE IL 29/07/1917 2 1 1101 120
975 1 ARI AR 05/08/1920 2 2 2105 120
1637 1 AWO OB 24/11/1938 2 1 1101 120
950 1 ENO ER 15/04/1928 2 1 1101 120
664 1 ILI AM 26/10/1925 2 1 1101 120
1145 1 ILI AN 20/05/1926 2 2 2105 120
1634 1 LAK OD 26/10/1954 2 1 1101 120
The names of clients are listed in this column.
View
Record Count: N/A
Enable Client Count
Show Non Hacc Clients
Filter Service
Filter String

The Tabs

Valid for MDS Export shows the records that are going to be included in the MDSExport file if you send it without revision.
NOT Valid for MDSExport displays the records that have been transferred from Trips that are not going to be included in MDSExport file if you send it without revision.
All Records displays all records transferred from one or more service programs that use the HACC MDS ID selected.
MDS Export Preview allows you to preview, client by client, the records that are valid for export. You can use the buttons at the top of the window to print the list or save it to an Excel file.

The Buttons and Checkboxes (at bottom of screen)

View button allows you to view the MDS Service Category and the number of instances of service for the highlighted record in the list. It also has an MDS Validation button that provides comment on why a record might not be valid for MDS.
Enable Client Count shows you the client count of records in the selected Tab category.
Show Non HACC Clients will allow you to view other Funding Types than HACC.
Filter Service allows you to show records limited to one service program, e.g. Transport.
Filter String allows you to limit the record list by entering a string, e.g. Social Support

Using the MDS Preview facility

Each person can work out the best strategy for their service. A typical strategy is to select the “Not Valid for MDS Export” tab and look at the various records. There are a number of reasons why a record isn’t valid, and only checking them (by double-clicking on the record) will let you know what the reason is.

Evaluation of records that are “Not Valid” requires application and persistence. Some are “not valid” for a valid reason, e.g. You are sending the HACC MDS and the record is CTP (NSW Transport) funded.

The data flows from the entry of a record in a service program such as Trips, through to it being included in a Service Event record in TMA Central and then it is combined with the client’s demographic data and compiled into the MDS or ICTDS transmission. Understanding this train of events makes it easier to use the available tools to troubleshoot service event shortfalls or errors.

Sending the MDS Export file

Once you have saved your MDSExport.xml (NSW) or MDSExport.csv (National) file you can send it by attaching it to an email addressed to your MDS Repository.

The address can vary from state to state. You don’t have to put a message in the email but you could put your services’ name in the subject line. The file attached contains information on the sender and identifies the computer program that produced the file.

In NSW there is a new address; **mds@dhs.nsw.gov.au**.

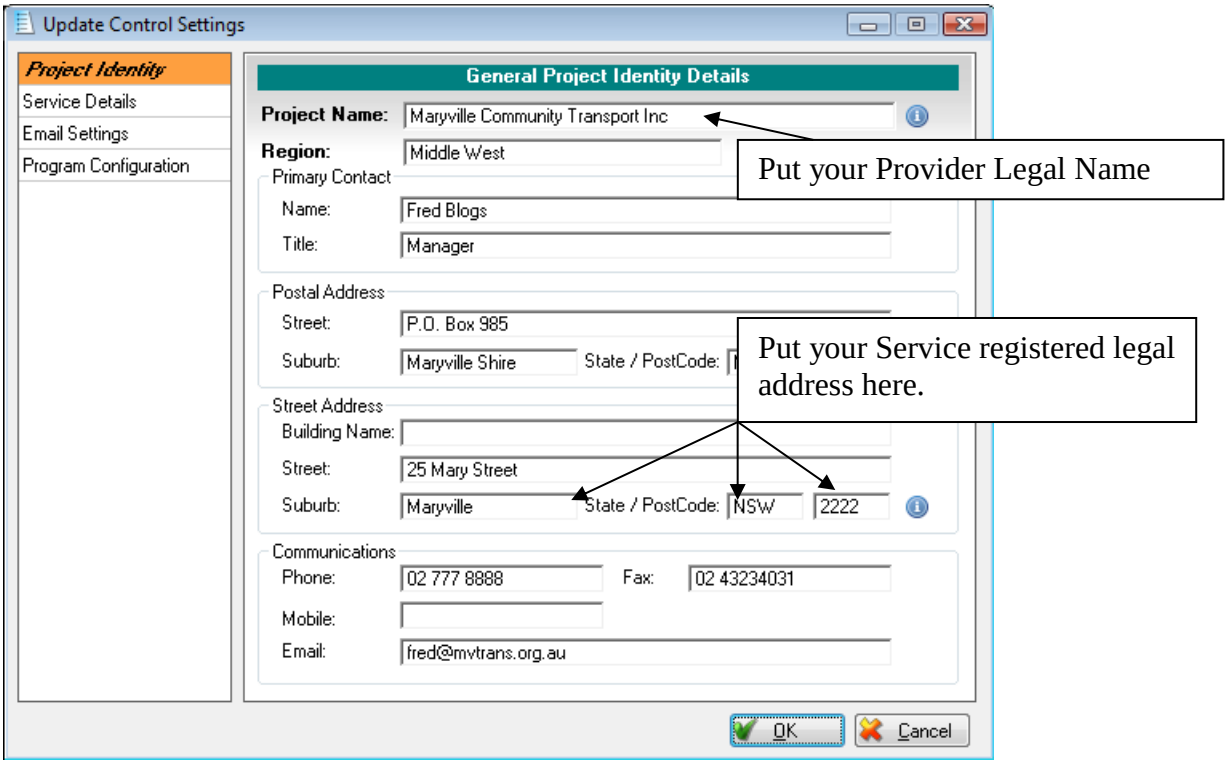
How to Send the ICTDS

This section covers the prerequisites and settings necessary to sending the ICTDS (Integrated Community Transport Data Set).

Setup your Programs

TMA Central – Project Identity

Here is a screen shot of TMA Central / *Control Settings* / *Project Identity*.



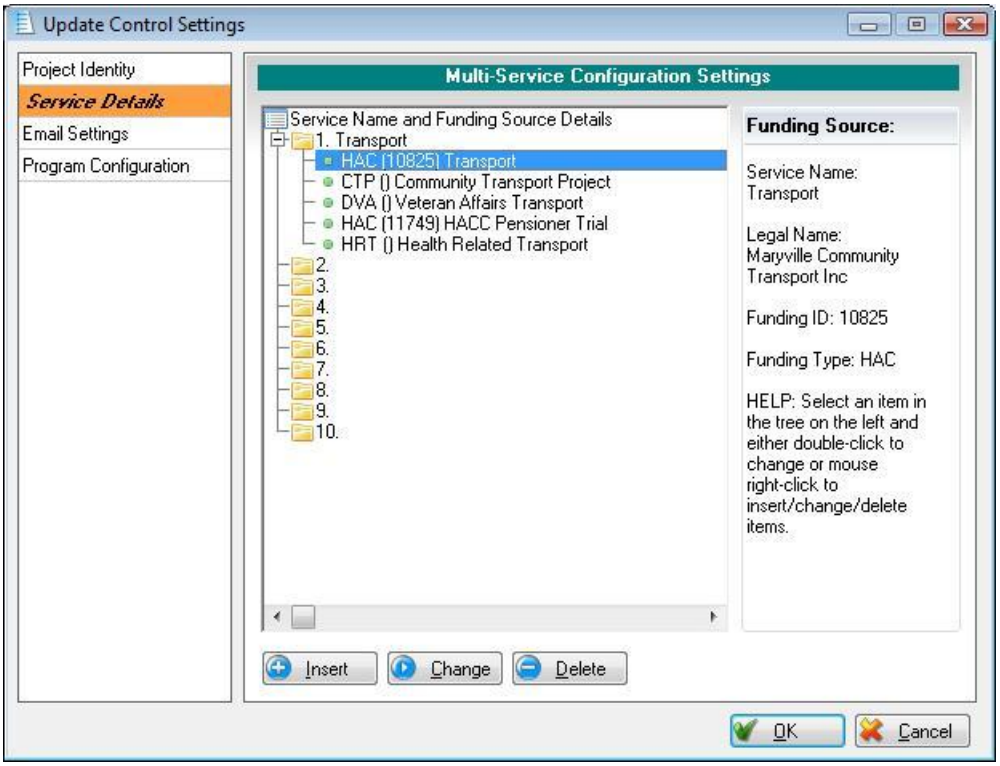
TMA Central – Service Details

It used to be that in order to send the MDS, Trips only had to transfer HACC data to TMA Central. We also set up facilities so that services that had more than one HACC contract with different HACC MDS ID's could transfer both sets of data.

Now, with the ICTDS we have to transfer data for many different funding types (HAC, CTP, AAS, HRT) from Trips to TMA Central. On top of that we had to take into account services that had special funding types that may or may not fall under one of the ICTDS Funding categories (HAC, CTP, AAS, HRT). So forgive us if our solution seems complicated.

During the upgrade process (covered in the document "ICTDS Upgrade & Setup") information in the Trips Funding Types table was transferred (linked) to TMA Central or not linked depending on the choices you made. We very much doubt that that the choices made in that process were correct for every service every time, so this next section is simply to make sure that the result of the process is correct.

Here is a screen shot of TMA Central / *Control Settings* / *Service Details*. This example displays the direct result of an Upgrade Linking process.

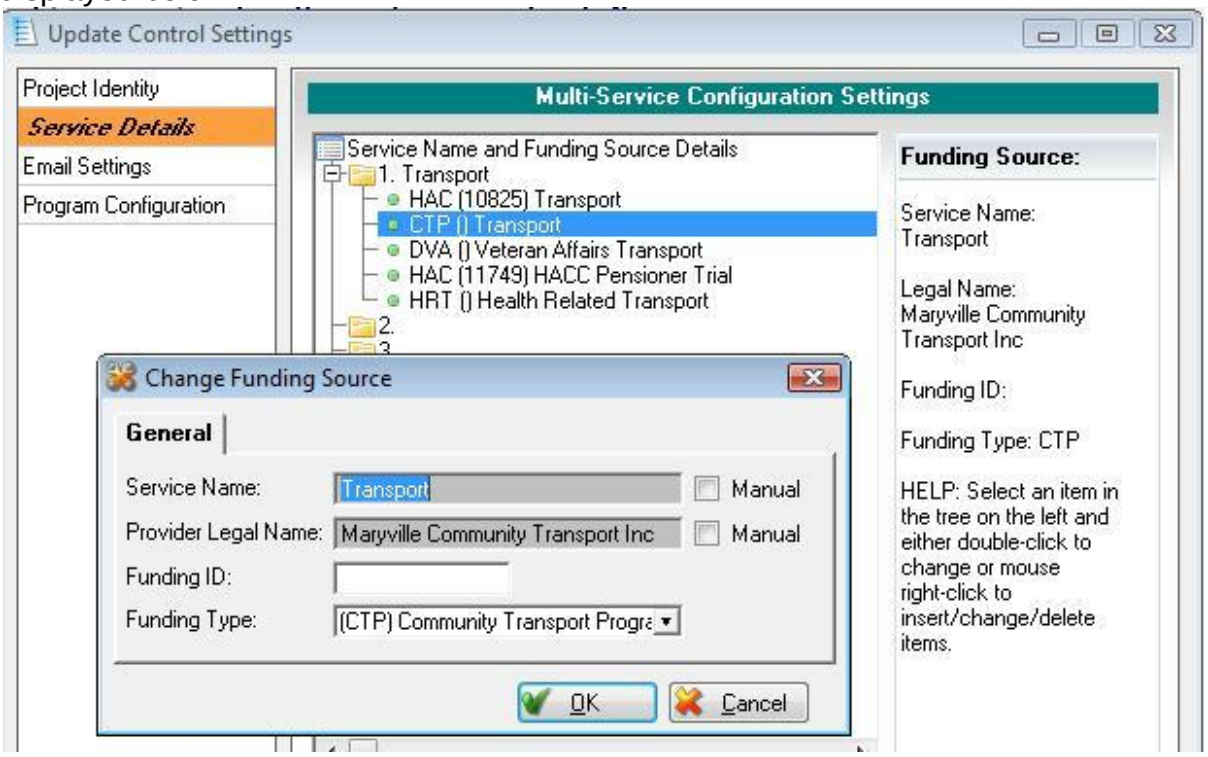


Notice how the numbers 10825 and 11749 are now linked to the "HAC" Transmission Funding Source. This Community Transport service has two HACC contracts and the Funding IDs were transferred from the Funding Types list in Trips during the upgrade process.

You can see that CTP and HRT do not have Funding IDs. In order to send the ICTDS the numbers have to be filled in.
Where you have a contract with Ministry of Transport (CTP and/or AAS) or the Department of Health (HRT) then the contract numbers should be on the contract documents, otherwise call and get the numbers from MoT or DoH.

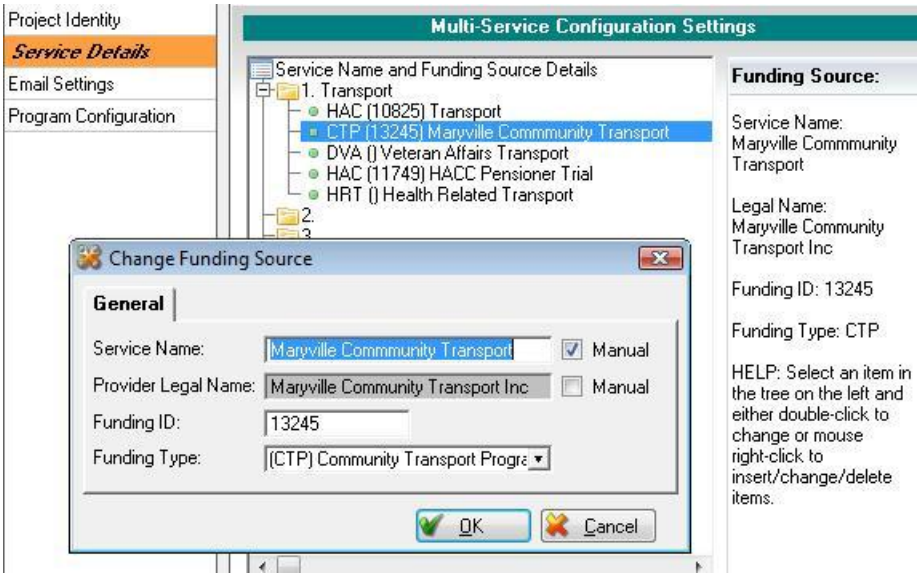
Note: DVA is included as a Funding Source simply to save a lot of coding work if DVA decide to be included in the ICTDS. There is currently no capability to transmit data to DVA from TMA Central.

We are now going to open the CTP record to check it and edit it if necessary. The Funding Source form obtained by opening (by double-clicking) the CTP record is displayed below:



Note that the Service Name has been picked up from the TMA Central column 1 name. It needs to be changed to your Service Name. Your Service Name might be the same as your Provider Legal Name or it may not. In this case the Service Name is ”Maryville Community Transport”. Tick the Manual checkbox on the Service Name line and edit the contents. You can also enter or edit your Provider Legal Name on this form by ticking the “Manual” checkbox on that line.

Note that the form is also missing the Funding ID for CTP. Obtain the Funding ID number and enter it. Trips will still work properly if you can’t obtain these details immediately but you must get the right data entered before sending your ICTDS transmissions. Below is the Funding Source form again. I re-opened it after the data was entered and saved and it shows I have entered the CTP Funding ID.



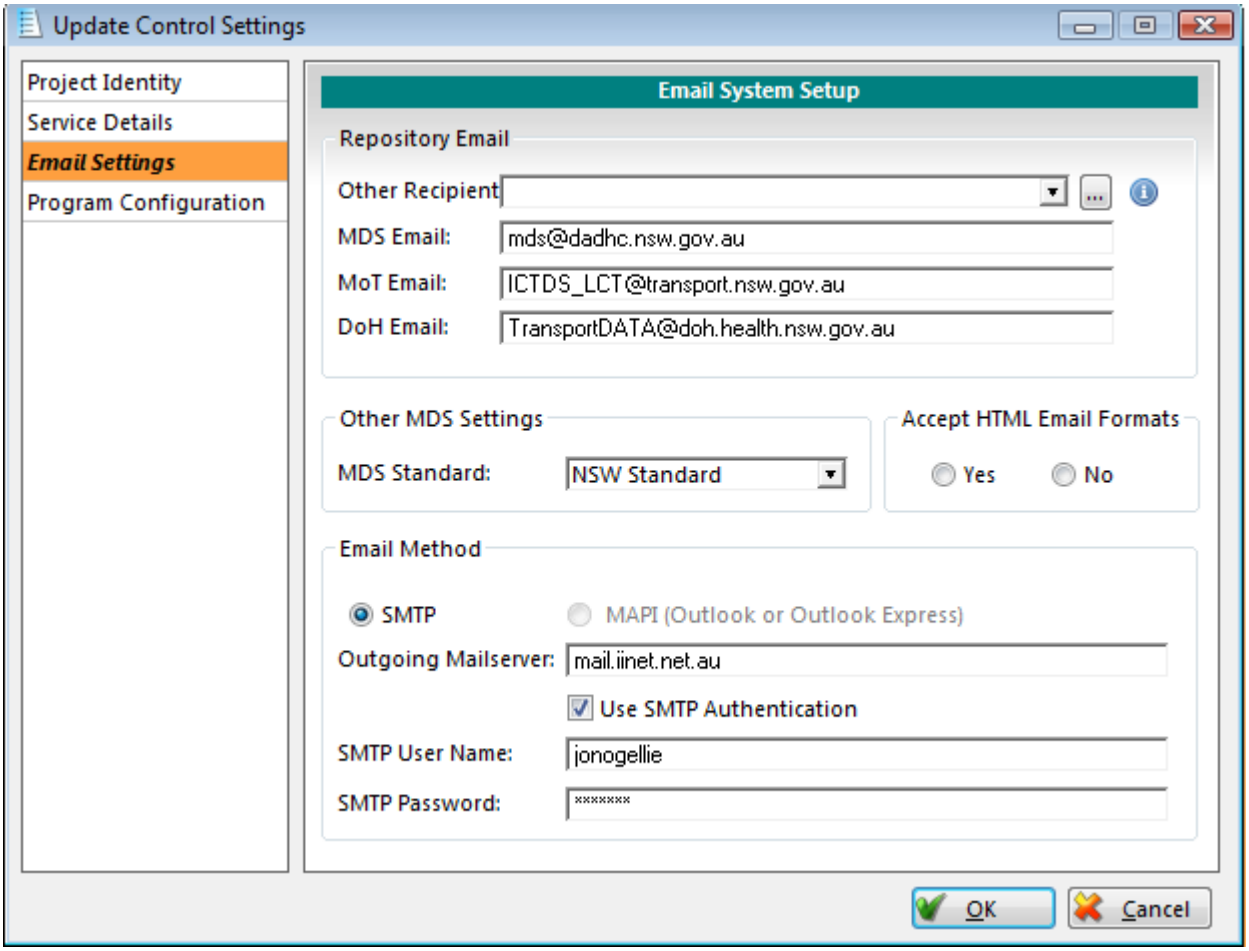
If you receive NSW Department of Health funding then you must go through the same process with the HRT item in Multi Service Configuration Settings.

If your TMA Central has multiple columns used for different programs you only need to fill out these fields for columns that transmit Transport data funded by DADHC, MoT or DoH.

(Page Insert added here)

TMA Central – Email Settings

The email settings are set here. For NSW the MDS, MoT and DoH email settings shown below are correct.



Currently the MAPI email option is not available. Set up your SMTP settings or get it set up for you. This is same as your Outgoing Mail Server details in your email program.

Sending the MDS and ICTDS (Step by Step Guide)

These steps assume that you have completed the Setup steps above and have completed entry and verified the transport activity in Trips Enterprise.

Trips

1. In Trips, from the Main Menu, select ***Tools/MDS ICTDS/Transfer Service Events to TMACentral.***
2. Check the year and quarter are set on the period you wish to send. If not correct it.
3. Click on the Start button.
4. Review the records transferred if you wish. The only difference here is that if you click on a name the Trips records listed show the Funding Type. Close the Wizard.

TMA Central

5. In TMA Central, if the client list is open, close it (makes for faster processing).
6. From the Main Menu select ***Funding Export.***
7. Check the year and quarter are set on the period you wish to send. If not correct it.
8. In the Destination Organisation box, click on **HACC** (if not already selected).
9. Check the Export File Portion and correct if needed (usually this is 1).
10. Click the **Next** button at the bottom of the screen.
11. If all the necessary data has been collected click the **Next** button again.
12. Preview the records if you wish. Preview is used for checking and troubleshooting.
13. Click on the **Save** button to save the export. You can do this for your own records.
    OR
14. Click on the **Email** button. The program will still ask you to save the export file and once you have it will create an outgoing email for you, ready to send (provided you use Microsoft Outlook or Outlook Express on your computer).

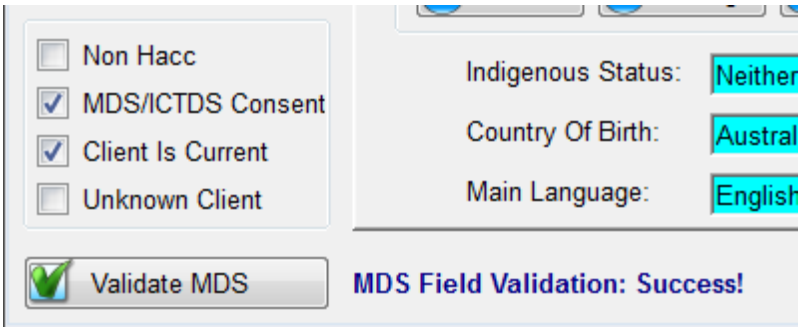
For Ministry of Transport and Health Related Transport transmissions you simply select **MoT** or **HRT** in step 9 and follow through with steps 10 to 15.

You only have to do the Trips steps (1 to 4) once for any quarters' set of transmissions. Of course if you correct data in Trips you would redo steps 1 to 4 before doing steps 5 to 14 for each Funding Source (HACC, MoT and/or DoH) that you have.

If you find you can't send your email automatically you can still send it using your normal email program as you have in the past. At step 14 you **Save** the transmission then use you email program to attach the transmission and send it to the correct recipient.

What makes a Trips record valid for sending the MDS/ICTDS?

Firstly the TMA Central client records have to be right. When validated (using the "Validate MDS" tool) the client record in TMA Central must have black text, or at the least maroon text. Red or green text records are not sent. Maroon text means that the MDS record for that client will be sent and accepted but you will receive error warnings.



On the left you can see the "Validate MDS" button for a single record.

This shows the bottom left of the TMA Central Client form.

There is also a process that will go through all client records and check that they validate:
From the main menu select *Tools/Repair Utilities/Validate MDS Complete.*

In Trips, for a trip record to be sent in the MDS / ICTDS it must:

a) have the correct funding Type (e.g. "HAC" for sending the MDS to HACC, CTP for NSW Transport and HRT for NSW Health)

b) include the Mode of Transport (Ensure the vehicle has the mode set)

c) have Individual or Group selected

d) have "1-way"or "2-way" selected

e) have a valid purpose (NonHACC is not a valid purpose for MDS)

f) be Verified

Tip: When you fix a wrong or blank mode in a journey record you must re-verify the journey record for the correct mode to be included in the trips records attached to that journey.

When exporting MDS data from Trips to TMA Central, where it comes up with the "MDS ICTDS Transfer Wizard" you can select the "Clients with Invalid Trips" tab. You can then check the mode column for completeness for each client. You can also spot other errors using this feature.

From Trips Enterprise: *Main Menu, Reports/Statistics* the following reports are specifically designed for checking errors with Trips Records: FNDP, FNDD and XFNP.

In Trips Enterprise the best method of confirming that your trip records will end up being sent is by the use of Trips Query.

Tip: If you open Trips Query and select the date range of the MDS Quarter then click on the column header for Mode, it will sort the records into mode alphabetical order. Any blank modes will appear at the top of the list. For the trips records with blank modes record the journey number and date visible at the top of the screen when that trip record is highlighted.

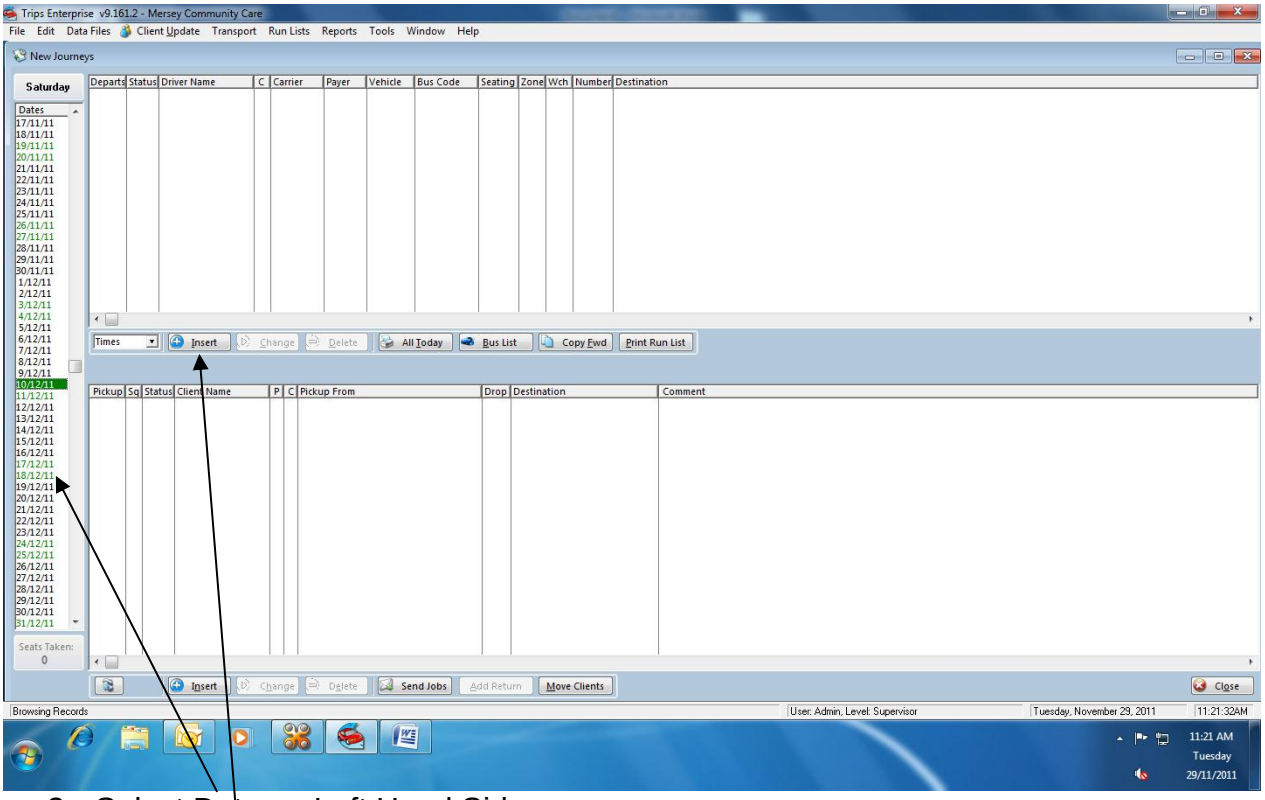
You can then find the journeys in the Register/Verify window, fix the mode and then re-verify.

Note: Trips Mode, 1 or 2 way and Trips Purpose are actually only included in the NSW MDS and ICTDS. However Trips has always provided more information for your use than the MDS requires so it is a good idea for non-NSW Trips users to record all of these values regardless.

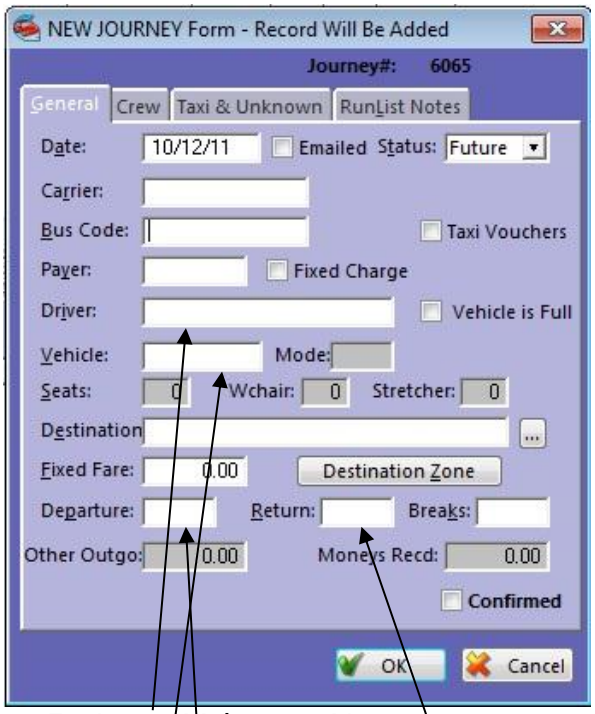
How to Record Other Service Events in Trips

Create New Job

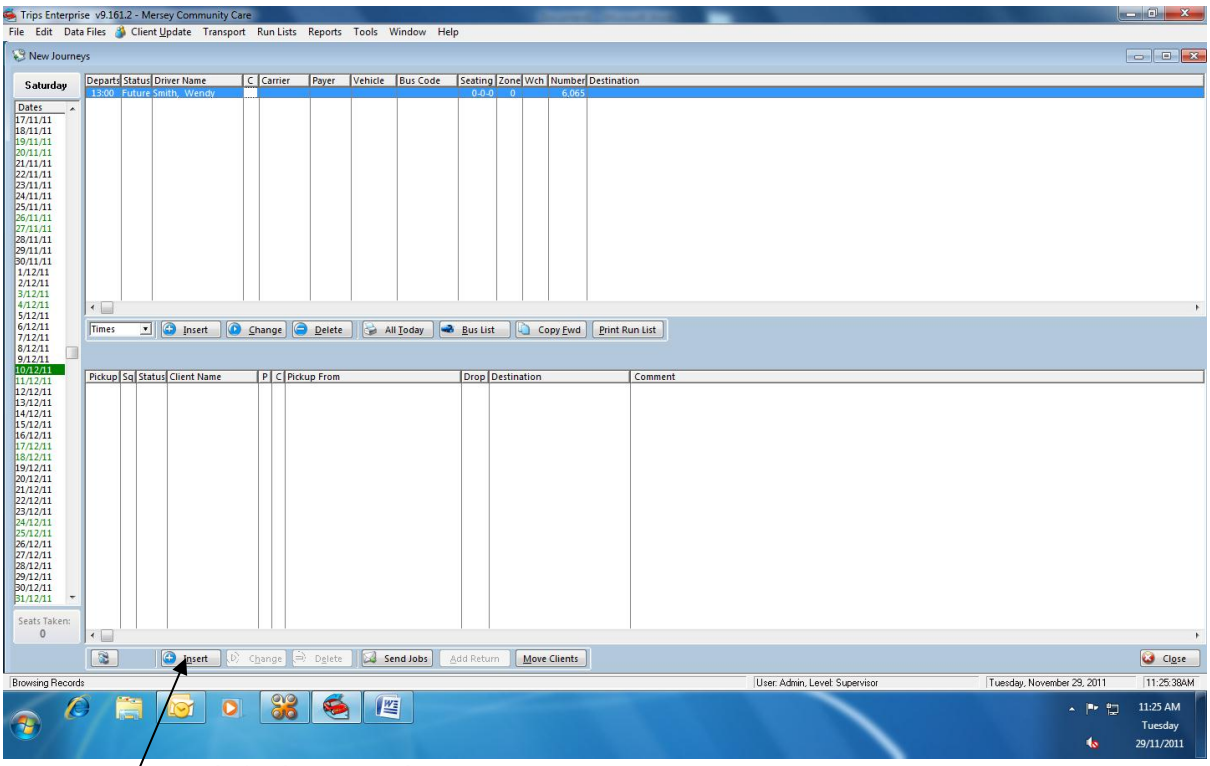
1. Open Trips
2. Transport Menu->New Journeys


Trips Enterprise v9.161.2 - Mersey Community Care
File Edit Data Files Client Update Transport Run Lists Reports Tools Window Help
New Journeys
Saturday
Dates
Departs Status Driver Name C Carrier Payer Vehicle Bus Code Seating Zone Wch Number Destination
Times
Insert Change Delete All Today Bus List Copy Fwd Print Run List
Pickup Sq Status Client Name P C Pickup From Drop Destination Comment
Insert Change Delete Send Jobs Add Return Move Clients
Close
Seats Taken: 0
Browsing Records
User: Admin, Level: Supervisor
Tuesday, November 29, 2011
11:21:32AM
11:21 AM
Tuesday
29/11/2011

3. Select Date on Left Hand Side
4. Select Insert in the top Journey Screen

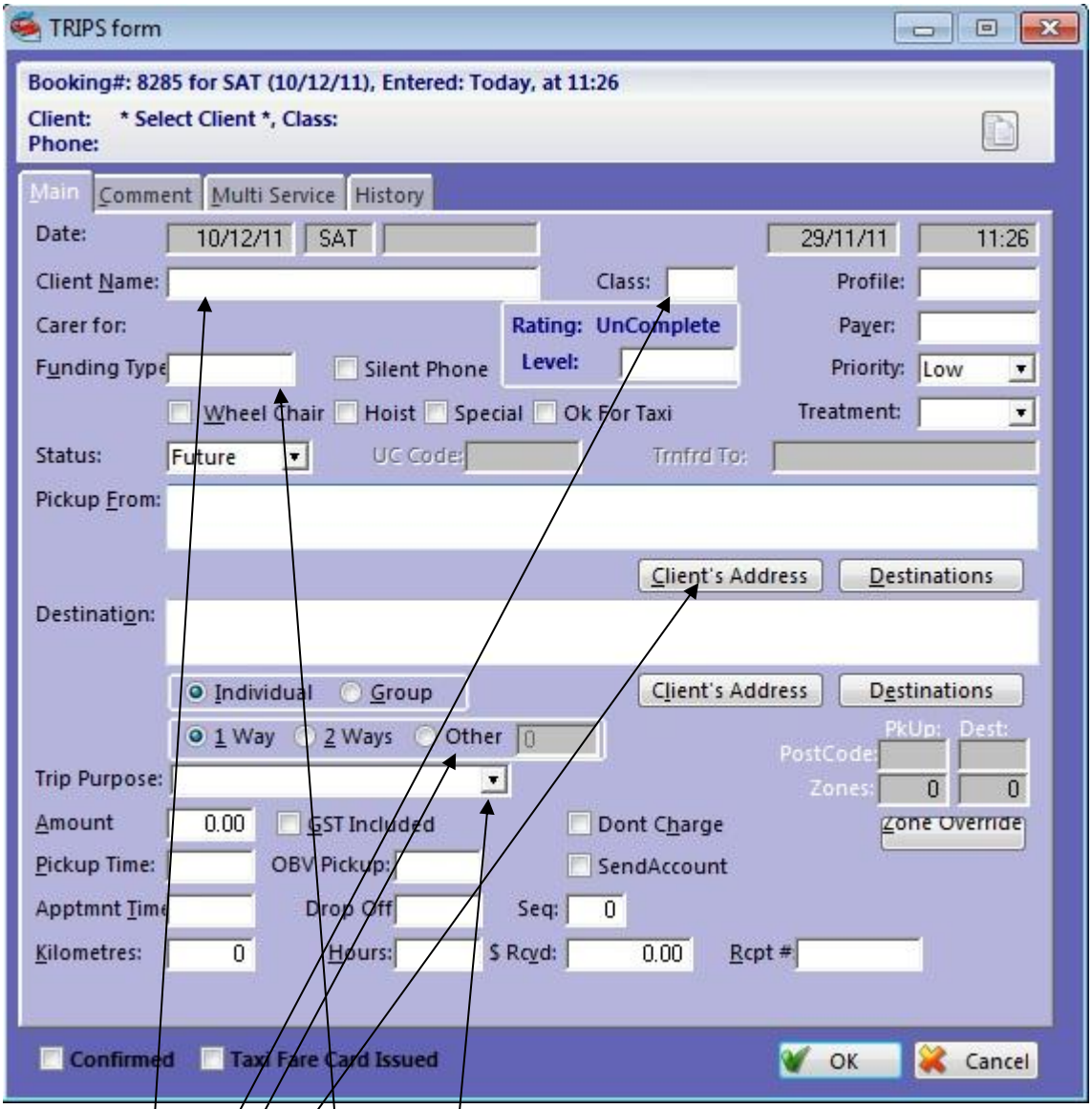


5. Insert Volunteer Name
6. Insert Vehicle Rego if wanted
7. Insert Departure Time & Return Time (Return Time is Optional)
8. Click OK to Create Journey


Trips Enterprise v9.161.2 - Mersey Community Care
File Edit Data Files Client Update Transport Run Lists Reports Tools Window Help
New Journeys
Saturday
Depart Status Driver Name C Carrier Payer Vehicle Bus Code Seating Zone Wch Number Destination
13:00 Future Smith, Wendy 0-0-0 0 6,065
Insert Change Delete All Today Bus List Copy Fwd Print Run List
Pickup Sq Status Client Name P C Pickup From Drop Destination Comment
Insert Change Delete Send Jobs Add Return Move Clients
Close
Browsing Records
User: Admin, Level: Supervisor
Tuesday, November 29, 2011
11:25:38AM
11:25 AM
Tuesday
29/11/2011

9. Insert Trip/Job Record

TMA SOFTWARE
Complete Community Transport Solutions

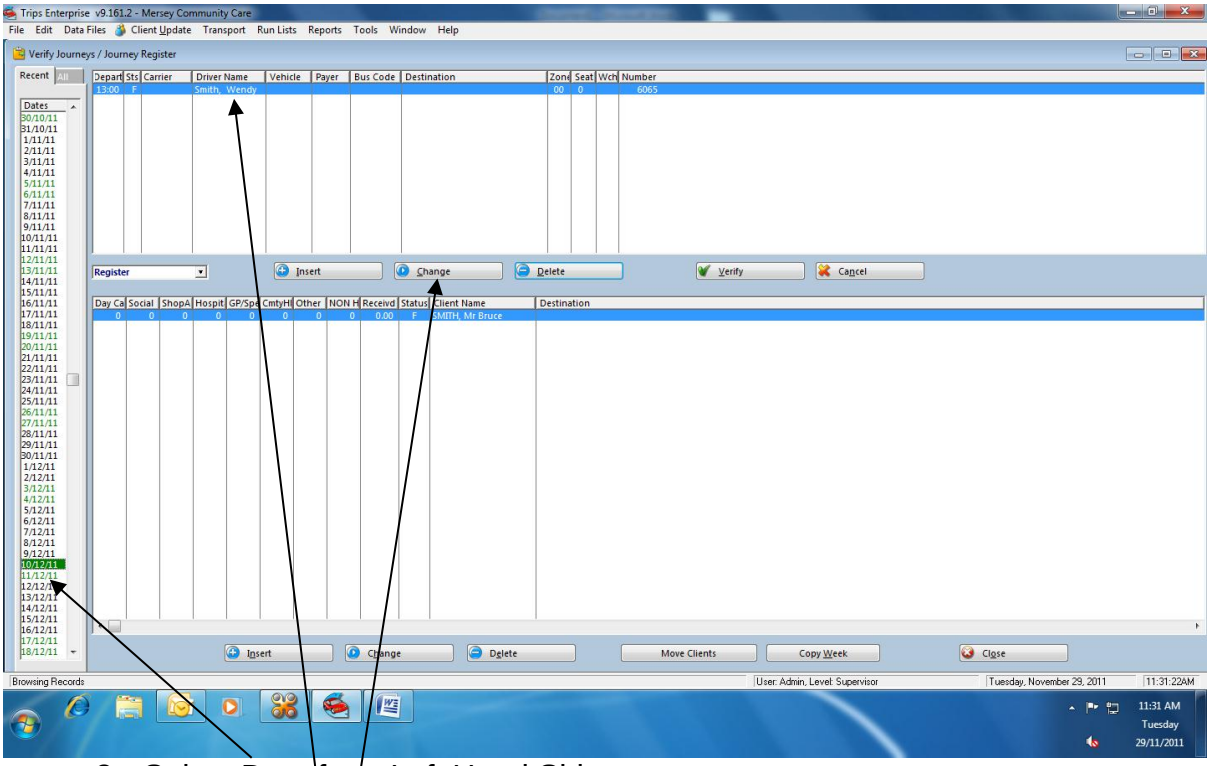


10. Enter Client Name
11. Enter Class & Funding Type if Required
12. Enter Client Address
13. Select Other and Trip Purpose Other from Menu
14. Click OK to Create Trip/Job.

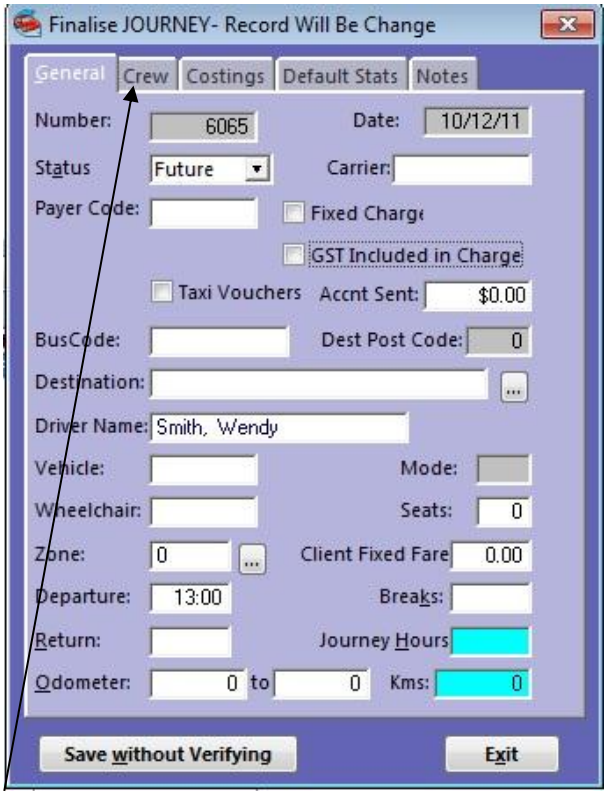
TMA SOFTWARE
Complete Community Transport Solutions

Verify Job

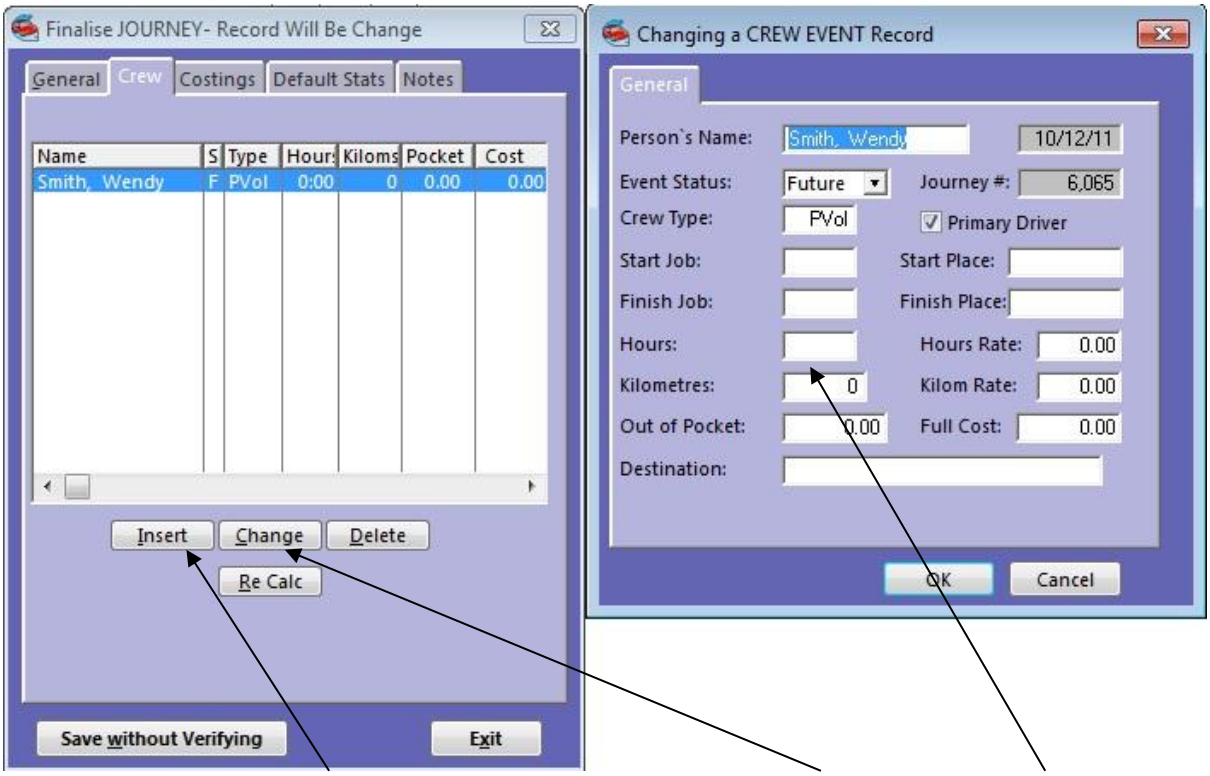
1. Go to Transport-> Register/Verify



2. Select Date from Left Hand Side
3. Select the Journey from Journey Window
4. Either click change or double click on Journey

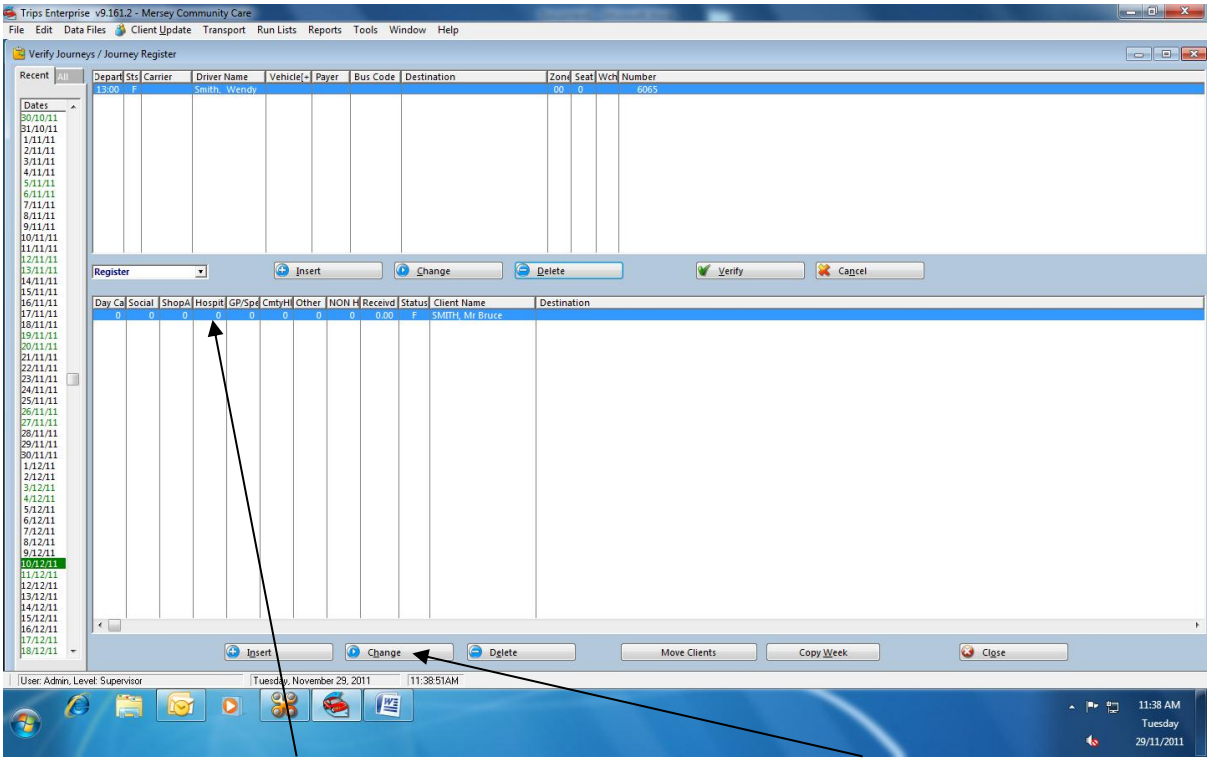


5. Left click Crew

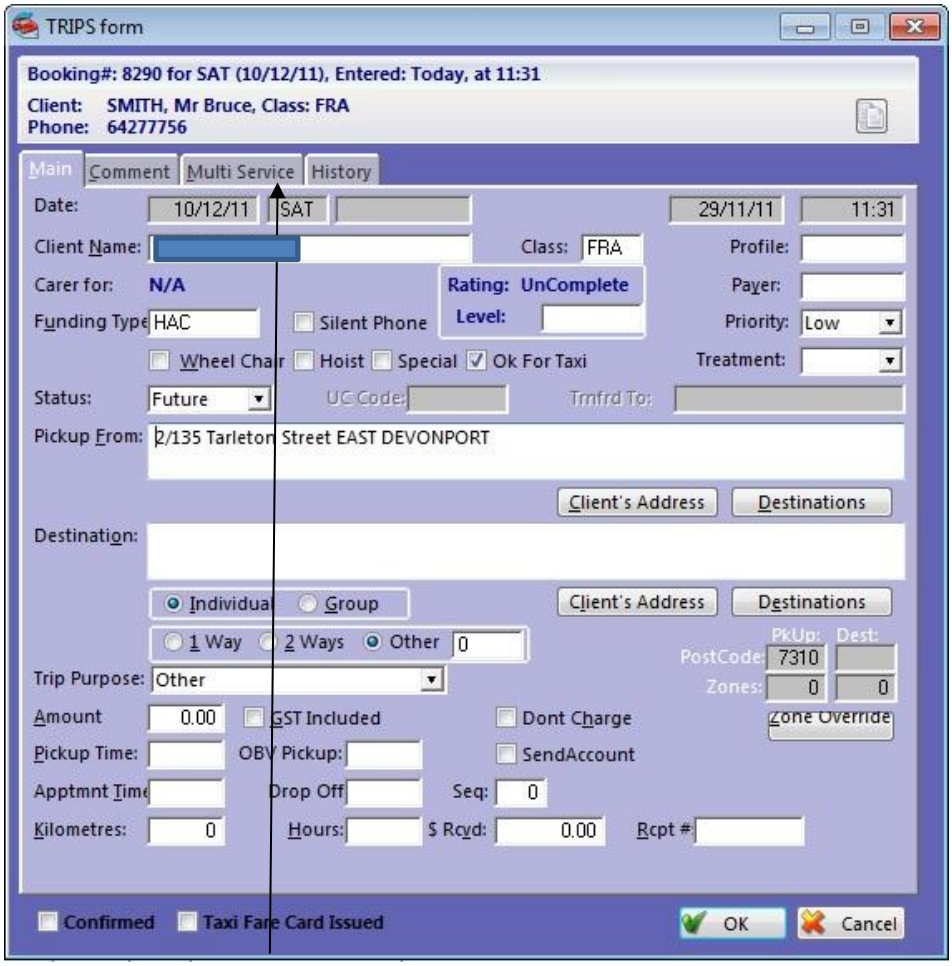


6. Either click insert to add additional Crew or click change to insert the hours for this Crew member

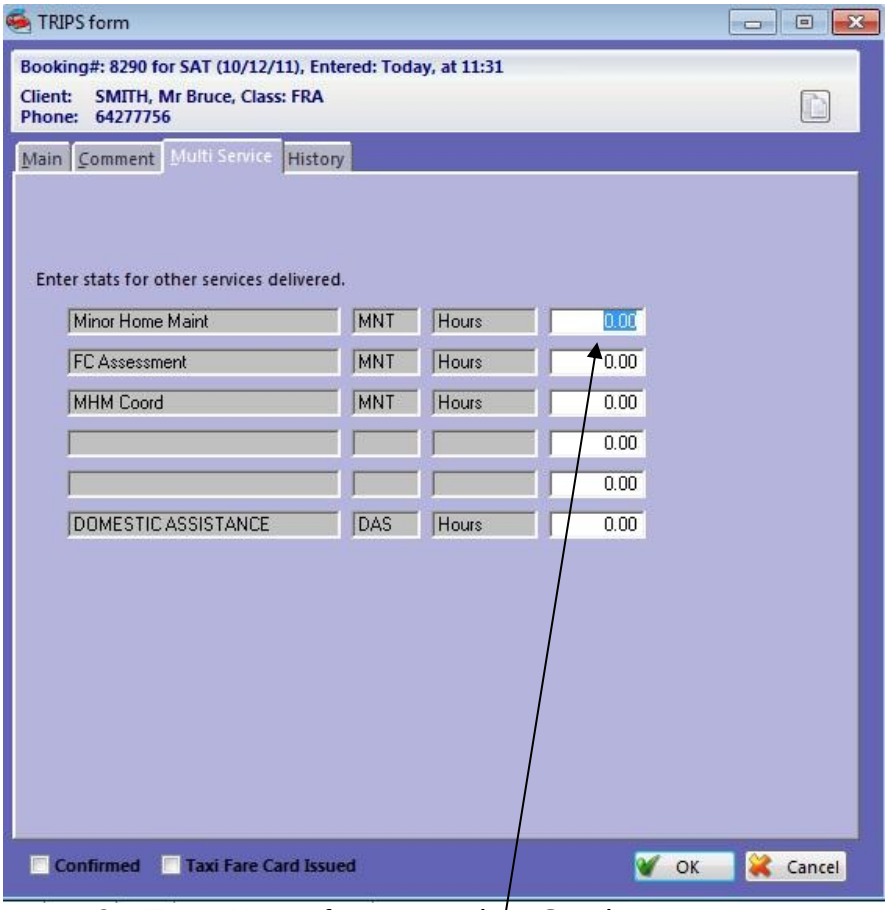
TMA SOFTWARE
Complete Community Transport Solutions



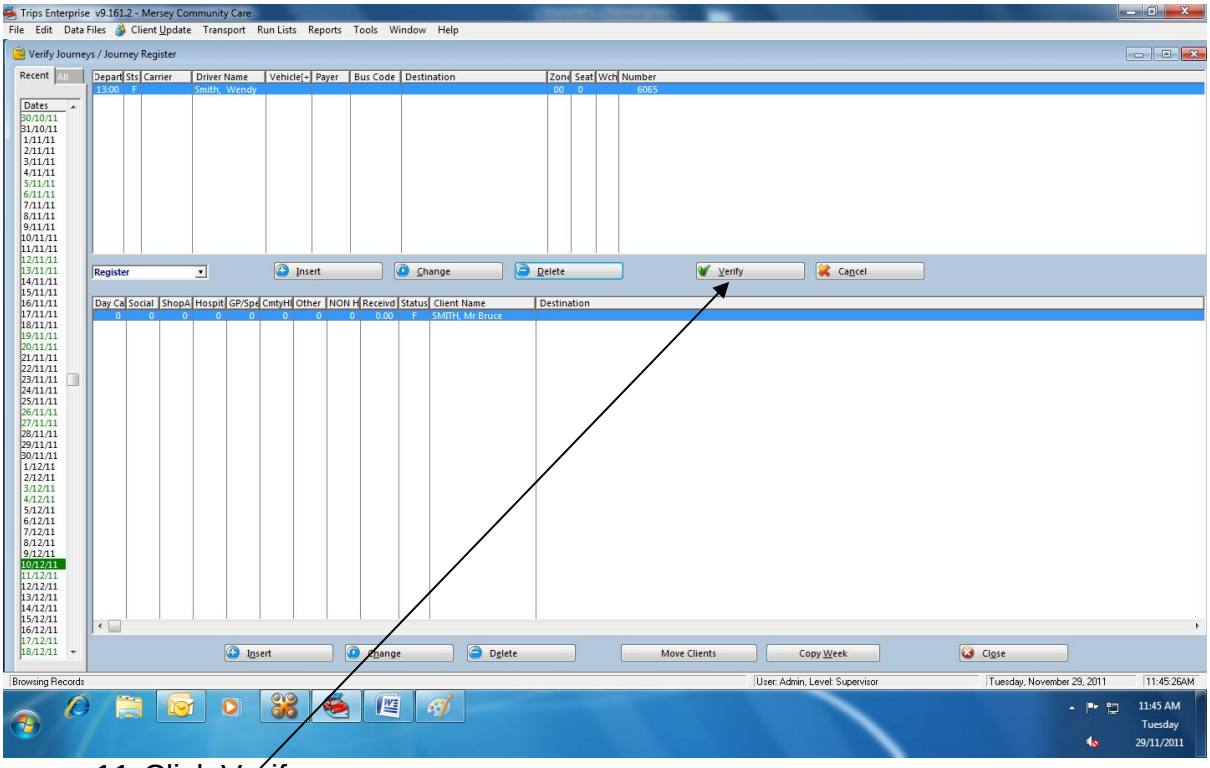
7. Select the Trip/Job from the Trips section, either click change or double click on the Trip/Job



8. Click Multi Service

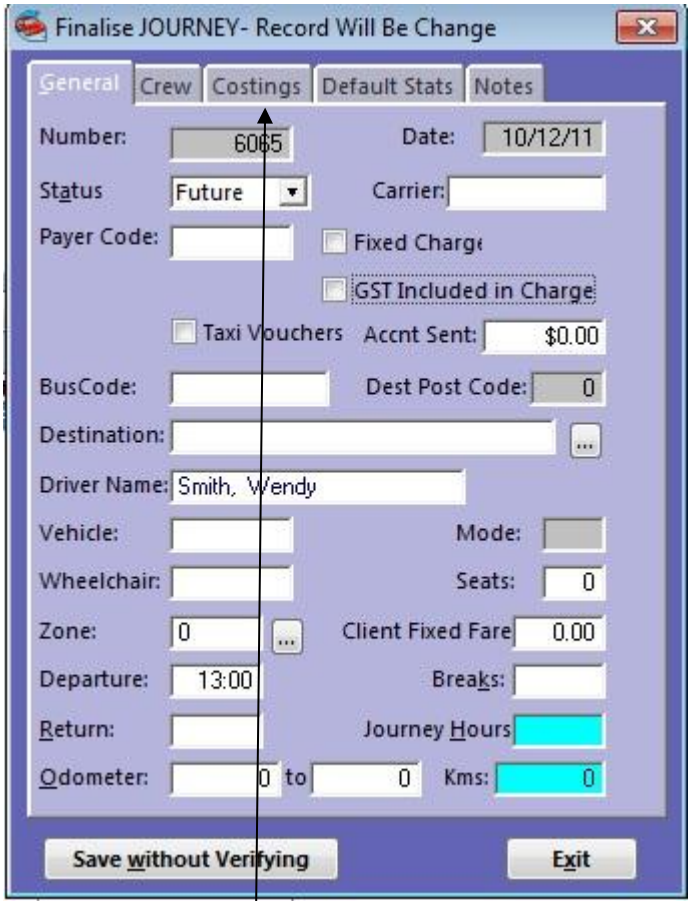


9. Enter Hours for appropriate Service
10. Click OK



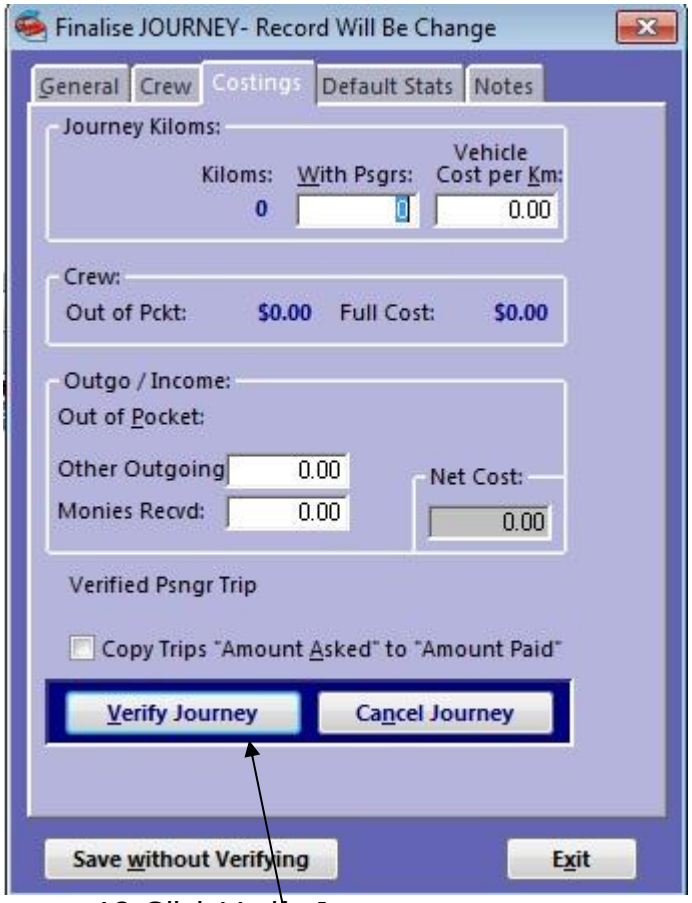
11. Click Verify

TMA SOFTWARE
Complete Community Transport Solutions



12. Click Costings

TMA SOFTWARE
Complete Community Transport Solutions



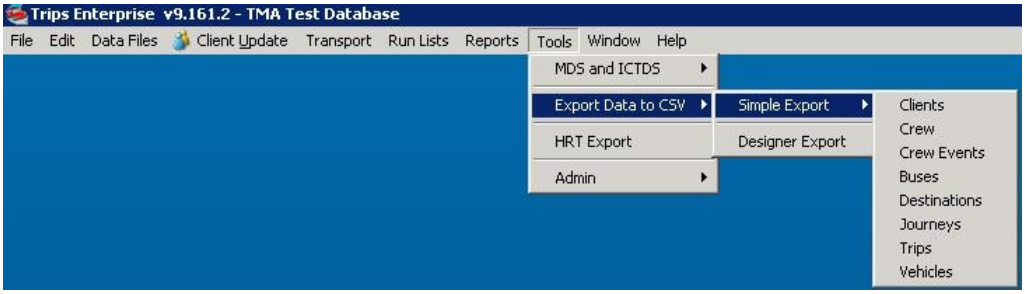
13. Click Verify Journey

Exporting Data from Trips and TMA to Excel

There are numerous ways to export data from Trips Enterprise and TMA Central to an Excel spread sheet for further calculations and presentations.

To export data from Trips Enterprise:

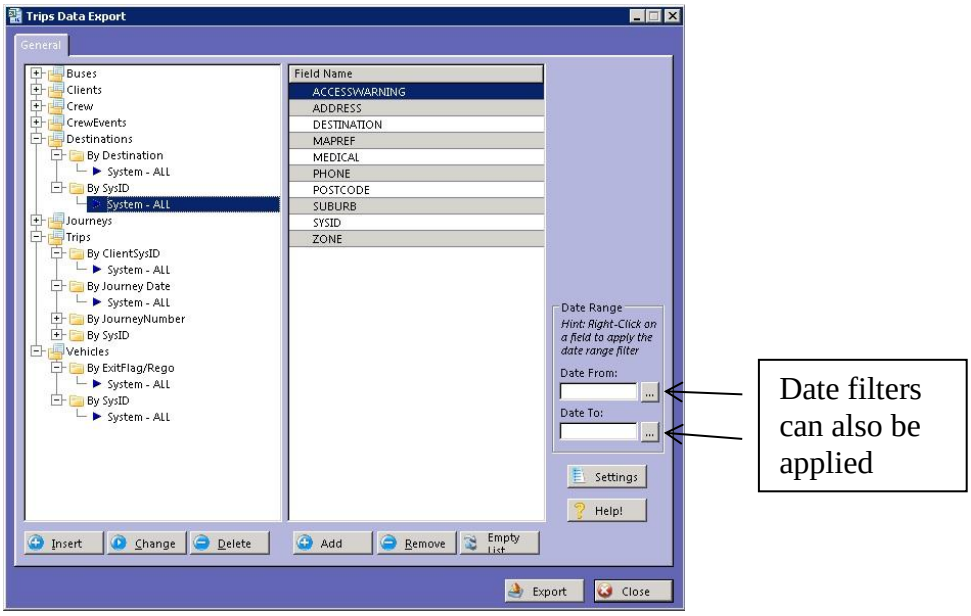
1. Go to Tools->Export Data to CSV



2. Then either Simple Export or Designer Export

Simple Export will export all of the records in Trips for the selected data table. For example selecting Crew will export all the Crew information to a file called crew.csv in your my documents folder. If you select a larger data table like Trips it will prompt you for a date range.

See next page for Designer Export.



Designer Export allows you to select which data fields you would like to export from the data tables.

For example if I wanted to create a data export that only had selected data from the Client data table I would follow these steps

1. Expand Clients and expand By Client Name
2. Left Click By Client Name and Left Click Insert
3. Enter a name for the Data Export (you can run the same export later on by selecting it from the list)
4. Left click on the new name and Left Click Add

5. This list contains all the Client data fields you can either select each field individually or hold CTRL and Left Click select multiple fields. Left Click Select when you have selected all the fields you need.

6. When you have selected all the data fields you want Left Click on Export to create the Excel file.
7. After the export has finished it by default it will save the export to you my documents folder in this case clients.csv it will also give you the option to Save As, Open File, Open Directory or Do Nothing.

You can also export data using the Trips Query function. Once you have created a query and the screen has displayed your results simply click Export and choose either Excel to display the results in Excel or choose filename to save the results in an Excel file for later use.

How to use Trips and Mail Merge in Word

For this example we are creating labels, but you could use this wizard to generate other types of documents as well.

1. Open Trips Enterprise
2. Go to Tools -> Export Data to CSV -> Simple Export -> Clients (this will create a file called clients.csv in your My Documents folder)
3. Open Word
4. Go to Mailings -> Start Mail Merge -> Step by Step Mail Merge Wizard
5. Select the type of Document on the right and Left Click Next: Starting document
6. Follow the prompts depending on the selected document type (ie select label size in label options)
7. Left click on Next: Select recipients
8. Select Use an existing list and Left Click Browse…
9. Browse to your My Documents folder and select the clients.csv file and Left Click OK
10. Left Click Next: Arrange your labels
11. Left Click on Address block..
12. Left Click on Match Fields
13. Use the drop down boxes to match the data fields from the client file and Left Click OK
14. Left Click Next: Preview your labels
15. Left Click Next: Complete the merge
16. Left Click Print.. to print your labels

Send Jobs Configuration and Usage

Overview

Send-Jobs *Driver* function allows you to email run lists to your drivers (called crew in Trips).

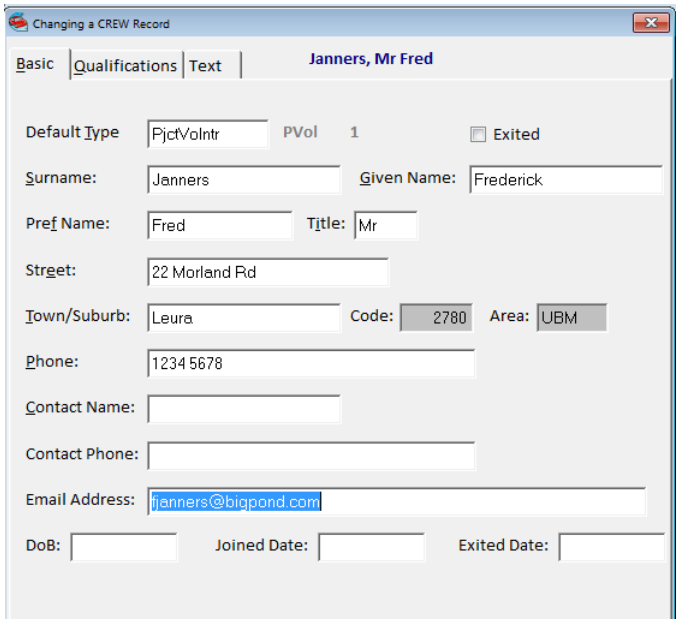
Send-Jobs *Carrier* function allows you to email run-lists to a "Carrier". A carrier is an external company or organisation such as a taxi company, a minibus service or another community transport service.

Prerequisites and set-up for using Send-Jobs.

Send-Jobs Driver

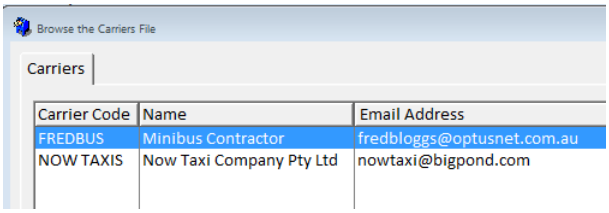
In the Crew Records under *Data Files/Crew* you will find that there is a field for an email address. This allows Send-Jobs to send a job (run-list) to the driver without you having to look up the driver's email address each time.

Of course it is important to keep all addresses including email address up to date in the Crew list.



Send-Jobs Carrier

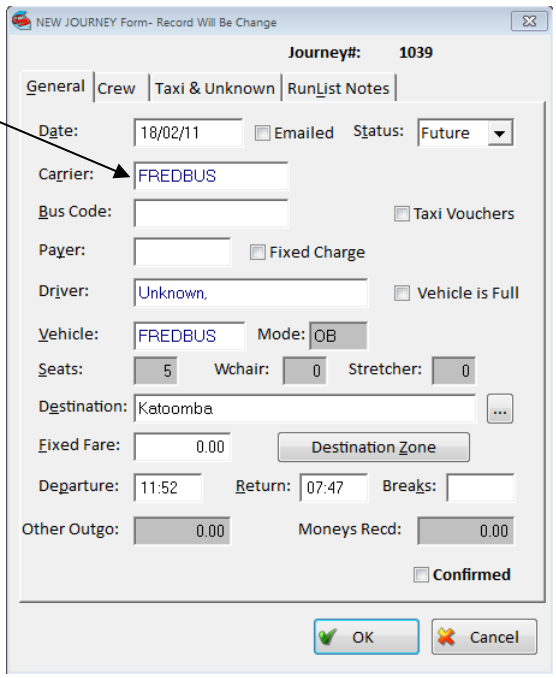
In "Trips" you may have noticed that Journeys have a "Carrier" field and that there is a Carrier table and form under *Data Files/Trips CT/Carriers* on the Main Menu. The Carrier table and input form can also be accessed under *Trips Carrier/Carriers* in the "Send-Jobs" program.



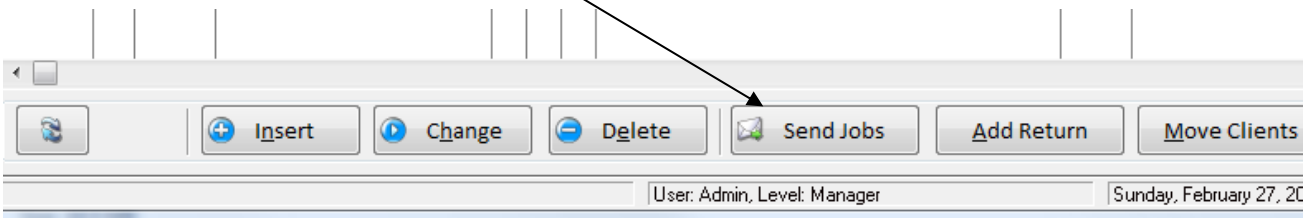
You enter as many Carriers as you have companies that you want to email run-lists to. A carrier is usually an independent contractor but this feature could also be used to send run lists to a distant vehicle base belonging to your organisation. Each Carrier must have a unique Carrier Code and a valid email address.

Carrier Codes are assigned to Journey records in the Trips program where you want to email run-lists to them using Send-Jobs.

When you create a Journey for a Carrier you have to enter a Carrier into the Carrier field and you also need to fill in the Vehicle and Driver fields. Make appropriate entries in the Crew and Vehicle tables for this purpose.

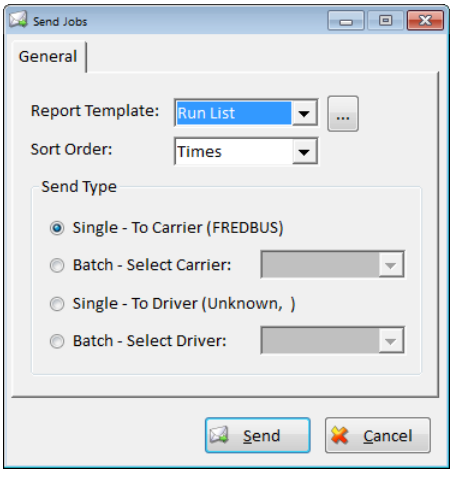


Whether you wish to send run-lists to a Driver or a Carrier the sending process is activated by highlighting the journey you wish send in the top list-box, then pressing the "Send-Jobs" button at the bottom of the New Journeys screen.



Sending the Job

The Send-Jobs window appears. It gives you four choices.

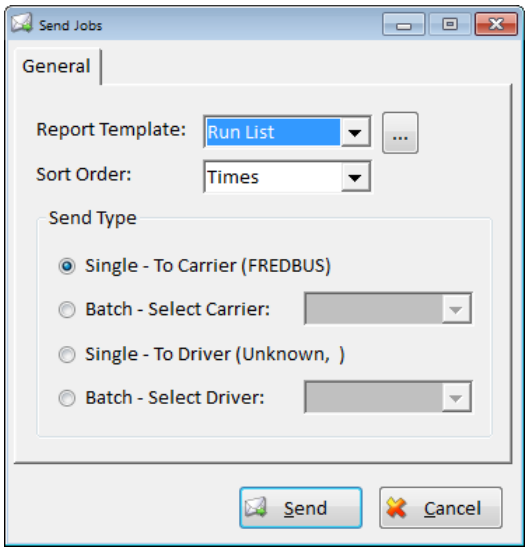


Single – To Carrier
Batch – T o Carrier
Single – To Driver
Batch – To Driver

"Single" means that Send-Jobs will send the highlighted record only. "Batch" means Send-Jobs will send all the journeys for that day, for that Carrier or that Driver.

When you press the "Send" button Trips will turn the run-list into a RTF (Rich Text format) document and send it. An RTF document can be read by Notepad, Wordpad and Microsoft Word so it is unlikely that the receiver will be unable to open it.

Changing format of transmitted data



The report Template field provides “Run List” format and “Taxi” Format.

If you wish you can create your own Run List formats by pressing the dotted button to the right of the Report Template heading. An example is available called “Trips Remote – Style 1”.

Make sure you don’t delete the existing default templates as you may need them in the future.

There is also a drop box that allows you to sort the run-list by time order, by sequence number order and by name order. Usually the default run lists are adequate.

Prerequisites

a) In order for Send-Jobs to work there has to be a folder called “emailed” under the “Trips Enterprise” folder (sometimes called “TripsEnt” or “TripsEnterprise”. Get your IT to add this folder for you. E.g. \TMA\TripsEnterprise\emailed.)

b) In order to use Send-Jobs you have to set up a connection between TMA Central and Trips Enterprise and the Internet. This connection is set up in TMA Central and once set up it allows:

i) direct emailing of MDS & ICTDS reports from TMA Central
ii) sending of TMA Central client records in NSW HADS format to other services
iii) direct emailing from Send-Jobs in Trips Enterprise

Note: In some Council & Health auspiced sites and a few others it may be that their IT infrastructure won’t allow direct access to the Internet by TMA programs. Sometimes it can be set up and sometimes it can’t. Contact your IT person to ascertain if you can use this facility.

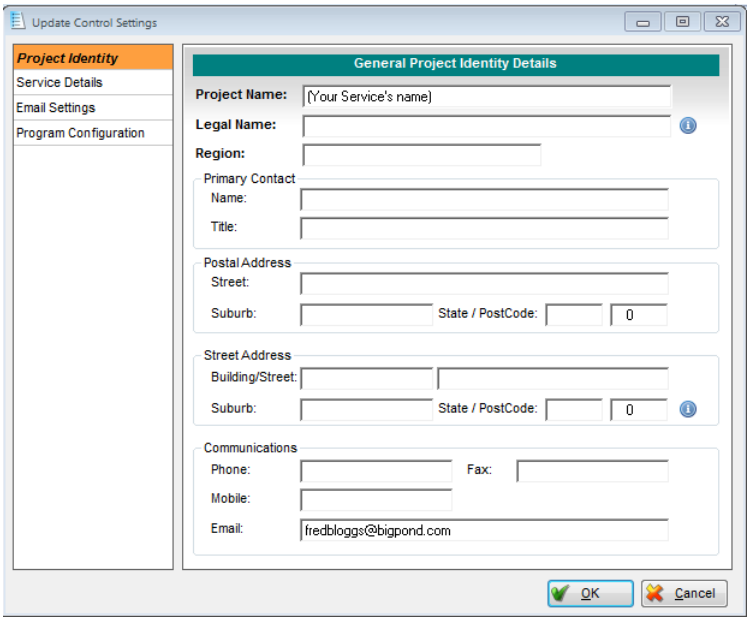
Setting up internet access

In order to send/receive email to/from the internet a program needs to know

Item	Example
Email address	fredbloggs@bigpond.com
Outgoing Mail Server	mail.bigpond.com
Incoming Mail Server	mail.bigpond.com

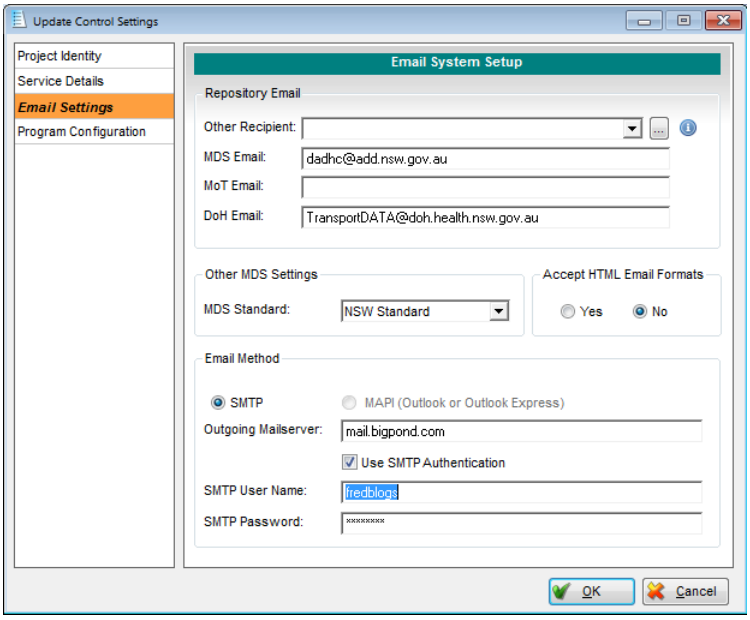
User Name fredbloggs
Password (a password)

In the Main Menu in **TMA Central** select Tools/ Settings then Project Identity on the list. Enter your email address at the bottom of the page.



In the Email Settings page fill in the Email Method section:

Enter your outgoing mail server
Tick "Use SMTP Authentication"
Enter your User Name
Enter your Password.
Click on "OK".



In this case we are only sending emails so we don't need to mention the incoming mail server.

Sometimes the incoming mail server name and the outgoing mail server names are different. Make sure you enter the outgoing mail server.

Test the connection by making yourself a crew member with your email address and using Send-Jobs to send yourself an email.

There can be a number of complications that only an IT person on site can sort out, so if you can't get it to work, consult your IT person.

How to Upgrade TMA Central and Trips Enterprise

If you are not comfortable completing any of these steps either consult your IT support or contact TMA Software.

1. Backup your TMA Central and Trips Enterprise Database
2. Backup your TMA Central and Trips Enterprise program folders.
3. In the TMA Central program folder run wupdate.exe
4. After the update has downloaded and installed run dbmtmacentral.exe
5. Check your database server name and database name is correct and click Connect
6. Open TMA Central, login (usually admin:admin) go to Help then Register Product
7. Copy and Paste your registration codes into the window and click OK
8. In the Trips Enterprise folder run wupdate.exe
9. After the update has downloaded and installed run dbmtripsent.exe
10. Check your database server name and database name is correct and click Connect
11. Open Trips Enterprise, login (usually admin:admin) go to Help then Register Product
12. Copy and Paste your registration codes into the window and click OK